



SDIMS – Home Community-Based Care

User manual

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Home Community-Based Care User manual

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Abbreviations

SITA	State Information Technology Agency
NDoSD	National Department of Social development
SDIMS	Social Development Information Management System
PERSAL	Personnel Salaries
IP	Internet Protocol
ID	Identity Document
VEP	
WAN	Wide Area Network
SDLC	System Development Life Cycle
SRS	Software Requirements Specification
KPI	Key Performance Indicator
GUI	Graphic User Interface
ERD	Entity Relationship Diagram
CHC	Community Health Centre
CHW	Community Health Worker
DHP	District Health Plans
DHS	District Health System
DMT	District Management Team
DOT/S	Directly Observed Treatment/ Strategy
EPWP	Expanded Public Works Programme
HCBC	Home Community-Based Care
IDP	Integrated Development Plan
IMCI	Integrated Management of Childhood Illnesses
M&E	Monitoring and Evaluation
MLW	Mid-Level worker
NPO	Non-Profit Organisation
NQF	National Qualification Framework
PHC	Primary Health Care
RPL	Recognition of Prior Learning
SAQA	South African Qualifications Authority
SLA	Service Level Agreement
VCT	Voluntary Counselling and Testing
WHO	World Health Organization

Preface

Scope of this preface

- ✓ Prerequisites for attending a Home Community-Bases Care module
- ✓ How Home Community-Bases Care training manual is organised.
- ✓ Related publications

Welcome to the **HOME COMMUNITY-BASED CARE** training. In this preface you will find the prerequisites for attending a **HOME COMMUNITY-BASED CARE** module, information on the layout of this training manual as well as publications that relates to the content presented in this training manual.

1. Prerequisites for this module


- a) Before you begin this module, you should comply with the prerequisites as listed below.
- b) Must be computer literate or have basic knowledge of using a computer.
- c) Be able to identify and interpret relevant policies and procedures related to the Application of an **HOME COMMUNITY-BASED CARE** to registration with the Department of Health and Social Development
- d) Read, Speak and write English as medium of instruction throughout the training session.

2. How this training manual is organised

The main objective of this training manual is to enable the SDIMS users to effectively utilise the system regarding all the respective applicable processes within **HOME COMMUNITY-BASED CARE** Module.

The purpose of this document is to outline the specific policies, procedures and operational rules that govern the completion of various tasks on SDIMS, specifically relating to the **HOME COMMUNITY-BASED CARE**. The policies and procedures manual describes the user instructions for performing both manual and electronic functions that are required to effectively use, operate and maintain the SDIMS module.

The reason for the compilation of this manual is to give all officials guidance as to the procedure that will be used by Department of Health and Social Development Officials in the capture, storage and retrieval of the **HOME COMMUNITY-BASED CARE** information. Further more it will be used to obtain uniform procedures Nationally.

 **Note:** all examples that might be used in this document and during the course of the training are purely fictional.
The examples are presented without prejudice and are for illustrative purposes only.

The layout of this user manual is indicated in the table below.

Table 1 - Training Manual layout

Chapter	Topic
Chapter 1	Introduction
Chapter 2	Registration <ul style="list-style-type: none"> Learning unit 1 – Organisation Search Learning unit 2 – HCBC Information Capturing Learning unit 3 – Personnel Registration Learning unit 4 – Reassign
Chapter 3	Organisation Reports <ul style="list-style-type: none"> Learning unit 1 – Organisation Reports Learning unit 2 – Monthly Stipend Learning unit 3 – Monthly Service Learning unit 4 – Training Learning unit 5 – Procurement Learning unit 6 – Quarterly Reports Learning unit 7 – Annual Reports
Chapter 4	Management <ul style="list-style-type: none"> Learning unit 1 – Funding Information Learning unit 2 – M&E Meeting Learning unit 3 – Supervisory visit Learning unit 4 – Problem Tracking Learning unit 5 – Sign-Off Reports

3. Related publications

List any applicable documentation under this heading.

Chapter 1: Introduction

Outcomes

- ✓ Summarise the **HOME COMMUNITY-BASED CARE** flow process.
 - ✓ Explain security issues on the system.
 - ✓ Identify different role players in the **HOME COMMUNITY-BASED CARE** module and explain system access levels assigned to each role player on system.
 - ✓ Connect to the internet, Log on to the SDIMS and change a user password.
-

1. System Description

HOME COMMUNITY-BASED CARE Module allows for the Registration, Management and Maintenance of Home and Community-Based Care that provide a comprehensive and quality health and social service within the home and community in order to promote, restore and maintain a person's maximal level of comfort, social functioning and health.

Many of these facilities share common information and thus the system was created allowing for their uniqueness. If an organisation is already registered in the NPO System, then the organisational details do not need to be entered again into the **HOME COMMUNITY-BASED CARE** Module, in this case some of the organisation details can not be amended. All **HCBC's** are required to register with the department.

1.1 System description

The main function of the **HCBC Module**: is the registration and management of HCBC organisation

The **HCBC Module** functions together with other modules of the SDIMS system. If an organisation is already registered in the NPO Module, it is not necessary to re-enter these details in the HCBC Module. Rather, the organisation needs only to be updated with the missing information.

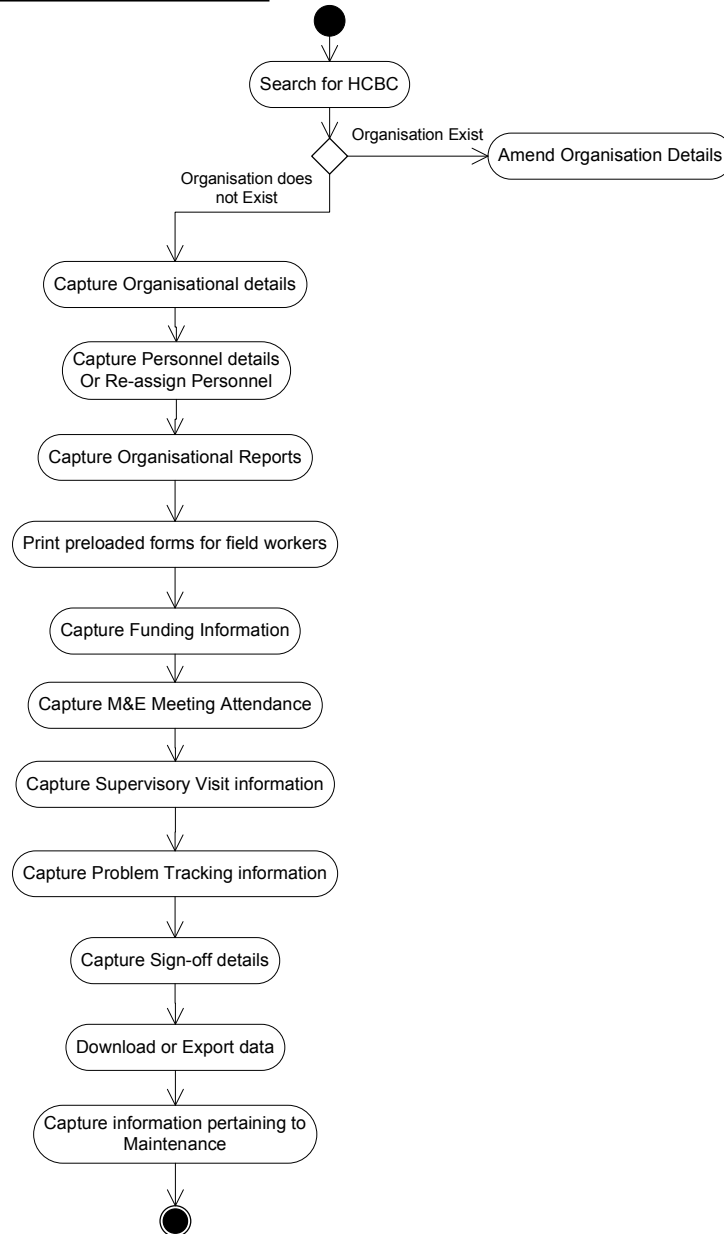
Selective Officials from Department of Social Development and Department of Health will

be responsible for inputting HCBC organisation information and for updating existing Organisation details. This information is entered through the online (web-based) system and stored in a central database. Supervisors and Managers, on the other hand, will monitor the progress of the module by generating reports.

1.2 HCBC Activity Diagram

Figure 1 - Home Community-Based Care Activity Diagram

HOME COMMUNITY BASED CARE



2. System Security

Given the nature of the information that is stored within the **HOME COMMUNITY-BASED CARE Module**, secure access to information is a priority. Users are assigned various security clearance levels based on their work functions or roles within the department.

The users of the **HCBC Module** and their main roles have been identified as follows:

Data Capturer will capture organisation details on the system

Coordinators will capture Sign-off details on the system

Supervisors and Management will monitor performance and effectiveness by accessing online reports on a monthly basis

These user groups correspond to the various security access levels that are available in the **HOME COMMUNITY-BASED CARE**.

A systems administrator handles the management of user security levels and passwords centrally.

A security access level is assigned by the systems administrator, and is associated with the PERSAL number of a particular employee. PERSAL numbers are unique personnel identification numbers that all salaried employees should hold.

3. Getting started on SDIMS

The system requires users to log on using a unique user name and password combination. This log in process ensures the integrity of the system and the information that is stored within it. User names are the PERSAL numbers, and the systems administrator assigns passwords. Passwords should at all times remain strictly confidential. Users should never give out their passwords to other users or outside individuals. SDIMS handles sensitive and confidential information, and as such the integrity of this data should always be a priority.

3.1 Connecting to the Internet

SDIMS is an online, web-based system that requires users to be connected to the Internet.

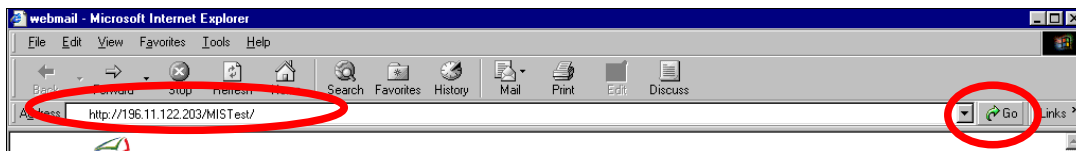
1. **Simply double-click on the "Internet Explorer" icon on the desktop interface.**

The web browser will load on your computer.



2. **Enter the IP address for SDIMS in the address bar directly under the tool bar in Internet Explorer.**

Note: Training Environment is different from the Live Environment; please make sure you are using the correct one.



3. **Press ENTER on the keyboard or click the "Go" icon on screen, adjacent to the address bar.**

The SDIMS Login screen loads. Input boxes labelled "User Name" and "Password" should be visible.



3.2 Logging on to SDIMS

In order to gain access to SDIMS, each user needs to supply the system with a unique user name and password combination. User names are employee PERSAL numbers, and passwords are assigned to each user by the systems administrator. Officials, who are not in possession of a password, should contact the systems administrator.

The procedure for logging in is as follows:

1. Enter your user name (PERSAL number) AND password.

Both the user name (PERSAL number) and password are required for login.

Note: If you enter either of the inputs incorrectly, you can use the "Clear" button to remove all entered text on the screen and begin again.



2. Press ENTER on the keyboard or click on the "Login" button on the screen.

The system automatically verifies your user name and password.

Note: If either of the inputs is missing, the system will display a message, "For these reasons your data could not be processed: User Name is required" OR "For these reasons your data could not be processed: Password is required". If you do not have a password, contact the systems administrator.

If either of these inputs are incorrect the system will display the error message, "Invalid username or password entered. Please try again". Check that your PERSAL number and password have been typed in correctly. Should the problem persist, contact the systems administrator to verify your access level, username and password.

If a user with the same PERSAL number and password combination are already logged in to the system, the system will automatically terminate the session of the previously logged on Official. At no time should any one else be in possession of your unique user name and password combination. Report this immediately to the systems administrator.

3. Once the user name and password combination is accepted by the system, you are logged in to SDIMS.

3.3 Changing a user password

1. Users can change their own passwords at any time.

- Once the user is logged into the system, the user should select "**Administration**" from the (SDIMS) main menu.

- The user should select "**System Maintenance**" from the HCBC main menu.

- The "**System Maintenance**" submenu will Expand
- Select "**Change Password**" button on the administration menu.

- The "**Change User Password**" screen loads. The user's current password and persal are automatically entered into the appropriate fields.

- Enter the new password in the field labelled; "**New Password**"

8. Enter the new password a second time in the **"Confirm Password"** field.
9. Select **"Module"** from the drop down list
10. Select **"Office"** from the drop down list
11. Select **"User Type"** from the drop down list
12. Click on the **"Change Password"** button.

The screenshot shows the 'Change User Password' form. The left sidebar contains a navigation menu with options: Registration, Organisation Reports, Print Blank Forms, Management, Generate Reports, Download Data / Export, System maintenance, and Logout. The main content area has a header 'Home Commu' and a sub-header 'change User Password'. Below this is a note: 'The asterisk [*] to the right of all labels denotes required fields'. The form fields are: User ID (99991004), New Password*, Confirm Password*, Module* (dropdown with 'HCBC' selected), Office* (dropdown with 'Department of Social Development' selected), and User Type* (dropdown with 'National' selected). At the bottom, there are two buttons: 'Change Password' and 'Print Password Change Form', both of which are circled in red. A footer note states: 'Once your password has been changed you will automatically be logged off the system. Please use your new password when logging onto the system.'

13. The system will take you to the login screen; you will have to type in your new login detail.

- You can also print the password reset form by clicking on the **"Print Password Change Form"** button.
- The password reset form will be display.
- Click from the Internet explorer menu option; **"File" → "Print"**.

This is an identical screenshot to the one above, showing the 'Change User Password' form. The 'Change Password' and 'Print Password Change Form' buttons are circled in red. The form fields and navigation menu are the same as in the previous screenshot.

14. **Select "HCBC" from the Main Menu.**

The Main Menu screen appears. Selecting **"HCBC"** from the navigation bar on the left hand side of the screen, allows the user to gain access to the Home Community-Based Care Module.

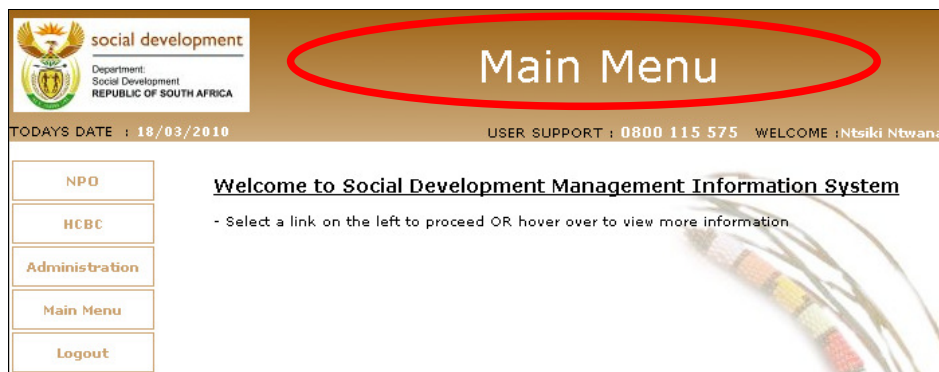


15. When the mouse pointer is positioned over any of the buttons in the navigation bar, a description of the relevant module will appear in the text block to the right of the navigation bar.

This enables users to decide which module they need to go to.

Note: That your name is visible on the top right hand side of the screen, if not please logout, and then login again.
User security restrictions may limit the number of buttons available on the navigation bar.

16. After selecting the "HCBC" button on the Main Menu, the **HOME COMMUNITY-BASED CARE** main menu page loads.



Chapter 2: Registration

The **Home Community-Based Care Module** requires the capturing official to capture the identifying details of the organisation and personnel details working on that organisation.

The starting point of the **Home Community-Based Care** is “**Registration**”, which is the first option on the HCBC main menu with its submenus listed below it.

The major functions of the Registration feature include the following:

1. Check if a Organisation has previously been captured
2. Capture of Organisation details
3. Capture of Organisation address details
4. Capture of Organisation’s contact person details
5. Capture of NPO Operation Areas
6. Capture of Organisation’s Personnel details
7. Update Personnel Qualification/Training information
8. Reassign Personnel to another level or to another organisation

Chapter 2: Registration

Learning unit 1: Organisation Search

Outcomes

- ✓ Search for the organisation from the database using different search methods.
- ✓ Navigate through the system to view organisation information that was captured previously.

1. Searching for Organisation

1. Information from the manual input tool form must be used to update the online **Home Community-Based Care**; the forms are loaded on the system and can be printed at any point.
2. Before entering any information in the **Home Community-Based Care**, the capturing official must first check to see whether the Organisation already exists in the system.
3. The Capturer can search by HCBC No, NPO No and Organisation Name.

3.1. Click on the dropdown arrow and select preferred option.

The screenshot shows the 'Home Community Based Care' system interface. On the left is a navigation menu with options: Registration, Organisation Reports, Print Blank Forms, Management, Generate Reports, and Download Data / Export. The main content area has a header with the South African coat of arms and 'social development' logo, and the title 'Home Community Based Care'. Below the header, it shows 'TODAYS DATE : 18/03/2010' and 'USER SUPPORT : 0800'. The 'Search Organisation' section features a dropdown menu with three options: 'HCBC Number', 'NPO Number', and 'Organisation Name'. The 'HCBC Number' option is currently selected and highlighted. To the right of the dropdown are 'Search' and 'Clear' buttons. Below the search section, there are links for 'Details', 'Contact Details', 'NPO Operation Areas', and 'N03a : HCBC Organisation Details'. At the bottom, there are input fields for 'HCBC Number' and 'NPO Registration Number'.

3.2. Enter information according to the selected search criteria.

3.3. Click the “Search” button

Note: If the information you entered is incorrect, click on the “Clear” button and begin again.
If the Organisation exists in the database, all details will be loaded on screen.

Note: If the entered Organisation details do not exist in the database, no Organisation information will be displayed. Use valid Organisation details and begin again, or proceed to the “Organisation Details” hyperlink to capture the details of this new Organisation. A message “*** No results were found for HCBC Number 100 ***” will be displayed

Chapter 2: Registration


Learning unit 2: HCBC Information Capturing

Outcomes

- ✓ Capture relevant Organisation information on the system.
 - ✓ Edit previously captured Organisation information
-

1. Organisation Details

1. “**Organisation Details**” is the first point of capture for a new Organisation.

 **Note:** Capturing Official will always check if an Organisation is already in the system before capturing new Organisation details (see “Organisation Search” above). This is extremely important in order to avoid duplication in the system.

1.1. Click the “Add” button

1.2. Click in each field to capture the Organisation's details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database or be assigned a HCBC number if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- **HCBC Number:** This field is generated by the system and cannot be entered or changed by the Capturer
- **NPO Registration Number:** This field will be displayed automatically but only if the organisation has been registered on the NPO Module, it cannot be entered or changed by the Capturer.
- **Name of Organization**
- **Registration Type:** This field is defaulted to display "HCBC"; it cannot be entered or changed by the Capturer. If the organisation has been captured on the NPO Module it will display "HCBC/NPO".
- **Registration Status**
- **Child Care Forum:** Click the box to indicate if HCBC belongs to Child Care Forum.
- **Date Established**
- **Record Creation Date:** Automatically display today's date
- **Nearest Hospital**
- **Nearest CHCs**
- **Clinics**

1.3 Click the "Save" button

The screenshot shows the 'Home Community Based Care' registration interface. The left sidebar contains navigation links: Registration, Organisation Reports, Print Blank Forms, Management, Generate Reports, Download Data / Export, System maintenance, and Logout. The main content area is titled 'NB3a: HCBC Organisation Details'. It includes fields for HCBC Number, NPO Registration Number, Name of Organization*, Registration Type* (set to HCBC), Child Care Forum (unchecked), Date Established* (02/03/2009), and Record Creation Date (18/03/2010). There is also a section for 'Health Care Facilities' with fields for Nearest Hospital, Nearest CHCs, and Clinics. At the bottom, there are buttons for 'Add', 'Edit', 'Cancel', and 'Save'. The 'Save' button is circled in red.

- Once Organisation details are saved, the system displays an information message to the Capturer regarding the saved status of the record "**HCBC number 78 was assigned to the organisation**". A HCBC number is automatically allocated to the new Organisation, visible in the "**HCBC number**" field. All fields are greyed out.

This screenshot shows the same registration form after saving. A message box is displayed in the center: 'HCBC number 85 was assigned to the organisation'. The message box is circled in red. The form fields are now greyed out. The 'Add' button at the bottom is now highlighted.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Organisation details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

- Once all Organisation details have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the registration screen, and complete all the forms that require Organisation data. The Capturer should pay careful attention to the mandatory fields, as data will not be able to be saved on a form where required fields have not been correctly completed.

2. Address Details

1. To proceed to the next form, the capturing official should click on the text hyperlink **"Address Details"**, adjacent to **"Organisation Details"**. **"Address Details"** is the second sub menu of the **"HCBC Organisation"** main menu button.

Note: If Organisation was captured on the NPO Module, the system will not allow editing in the Address page of HCBC, and amendment can only be done on the NPO Module select list.

Search Organisation

HCBC Number

| Organization Details | **Address Details** | Contact Details | NPO Operation Areas |

HCBC number 78 was assigned to the organisation

2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

Home Community Based Care

TODAYS DATE : 18/03/2010 USER SUPPORT : 0800 115 575 WEL

Registration

Organisation Reports

Print Blank Forms

Management

Generate Reports

Download Data / Export

System maintenance

Logout

Search Organisation

HCBC Number

HCBC Organisation Details

HCBC Number

Name of Organization

Date Established

| Organization Details | **Address Details** | Contact Details | NPO Operation Areas |

*** No results were found for

Location

Address Type*

Province*

3. Capturing official capturing new Organisations should endeavour to ensure that Address details are accurately captured and meticulously verified with the Organisation. The successful implementation of the system rests largely on reliable Address information. Without such information it is impossible to progress on an organisation monitoring in a meaningful way.

3.1. Click the "Add" button

3.2. Click in each field to capture the Address details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- **Address type:** an organisation cannot have more than one address per address type
- **Province:** Capture select from the pre-loaded list
- **District:** this field depends on the Province field, the system will only populate district that belong to the selected Province.
- **Sub-district/Local Municipality:** this field depends on the District field; the system will only populate Sub-district/Local Municipality that belong to the selected District.
- **GIS: Latitude (optional)**
- **GIS: Longitude (optional)**
- **P.O. Box / Street no**
- **Suburb / Village**
- **Town:** this field depends on the Sub-district/Local Municipality field; the system will only populate Town that belong to the selected Sub-district/Local Municipality.
- **Postal Code:** is automatically displayed once the Town is selected. The capture has an option to edit.

Note: If a town does not appear as an option, the Capturer should contact the module administrator and have these details added to the select list.

3.4. All Address details are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click **"Save"** again.

If there are errors in the Address details OR it is necessary to change them, the capturing official concerned should click on the **"Edit"** button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the **"Save"** button is not clicked, changes to any field will not be updated in the database. As per the **"Add"** procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in **"Edit" mode** or **"Add" mode**, click the **"Cancel" button**. All data will be cleared. The **"Cancel"** button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the **"Cancel"** button.

4. Once all Address details have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the Registration screen, and complete all the forms that require Organisation data.

3. Contact Details

1. To proceed to the next form, the capturing official should click on the text hyperlink **"Contact Details"**, adjacent to **"Address Details"**. **"Contact Details"** is the third sub menu of the **"HCBC Organisation"** main menu button.

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number

Name of Organization

Date Established

| Organization Details | Address Details | **Contact Details** | NPO Operation Areas |

*** No results were found for HCBC Number 74 ***

Contact Details

2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number


Name of Organization

Date Established

| Organization Details | Address Details | **Contact Details** | NPO Operation Areas |

*** No results were found for HCBC Number 74 ***

Contact Details

 **Note:** There can only be one contact person captured in this page.

2.1. Click the "Add" button

2.2. Click in each field to capture the Contact's details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- **Name**
- **Surname**
- **Position**
- **Previous Position**
- **Telephone Number**
- **Fax number**
- **Cellular number**
- **Email Address**
- **Web Address**

2.3. Click the "Save" button

- 2.4. All Contact details are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.

The screenshot shows the 'Home Community Based Care' interface. On the left is a sidebar with navigation links: Registration, Organisation Reports, Print Blank Forms, Management, Generate Reports, Download Data / Export, System maintenance, and Logout. The main content area has a header with the South African coat of arms and 'social development' logo. Below the header, there's a 'Search Organisation' section with a dropdown for 'HCBC Number' and 'Search'/'Clear' buttons. The 'HCBC Organisation Details' section contains fields for 'HCBC Number' (85), 'Name of Organization' (Abongile), and 'Date Established' (02/03/2009). A red oval highlights a message: 'Contact Person details have been saved successfully'. Below this, the 'Contact Details' section shows 'Name*' (Oliver) and 'Surname*' (Zundu).

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Contact details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

3. Once all Contact details have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the Registration screen, and complete all the forms that require Organisation data.

4. NPO Operation Areas

1. To proceed to the next form, the capturing official should click on the text hyperlink **"NPO Operation Area"**, adjacent to **"Contact Details"**. **"NPO Operation Area"** is the fourth sub menu of the **"Registration"** main menu button.

REPUBLIC OF SOUTH AFRICA
TODAY'S DATE : 01/12/2009

Registration
HCBC Organisation
Personnel
Reassign
Organisation Reports
Print Blank Forms
Management
Funding Information
M&E Meetings
Supervisory Visits

Search Organisation
HCBC Number 74 Search Clear

HCBC Organisation Details
HCBC Number 74
Name of Organization Mzekelo Omhle
Date Established 05/07/2007

| Organization Details | Address Details | Contact Details | **NPO Operation Areas** |

*** No results were found for HCBC Number 74 ***

Contact Details

2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

REPUBLIC OF SOUTH AFRICA
TODAY'S DATE : 01/12/2009

Registration
HCBC Organisation
Personnel
Reassign
Organisation Reports
Print Blank Forms
Management
Funding Information
M&E Meetings
Supervisory Visits

Search Organisation
HCBC Number 74 Search Clear

HCBC Organisation Details
HCBC Number 74
Name of Organization Mzekelo Omhle
Date Established 05/07/2007

| Organization Details | Address Details | Contact Details | **NPO Operation Areas** |

*** No results were found for HCBC Number 74 ***

Contact Details

2.1. Click the “Add” button

Home Co

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number: 148

Name of Organisation: Prime Time

Date Established: 10/05/2006

| Organisation Details | Address Details | Contact Details | NPO Operation Areas |

*** No results were found for ***

NPO operation areas

Province* Please select below

District* Please select below

Municipality* Please select below

Ward*

Add Edit Cancel Save Print

3.2 Click in each field to capture the NPO Operation Area OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- **Province:** Capturer select from the pre-loaded list
- **District:** this field depends on the Province field, the system will only populate district that belong to the selected Province.
- **Municipality:** this field depends on the District field; the system will only populate Municipality that belong to the selected District.
- **Ward:**

3.3 Click the “Save” button

Home Co

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number: 147

Name of Organisation: Test for training

Date Established: 04/04/2007

| Organisation Details | Address Details | Contact Details | NPO Operation Areas |

NPO operation areas

Province* Northern Cape

District* Frances Baard

Municipality* DIKGATLONG

Ward*

Add Edit Cancel Save Print

3. All NPO Operation Area are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.

The screenshot shows the 'Home Community' page. Under the 'Search Organisation' section, there are fields for 'HCBC Number' (74), 'Name of Organisation' (Mzekelo Omhle), and 'Date Established' (05/07/2007). Below this, a message bar indicates 'Ward details saved successfully'. The 'NPO operation areas' section contains a table with columns: 'Ward', 'Municipality', 'District', 'Save', and 'Delete'. The first row shows '105', 'Makhado & Molemole', and 'Pixley Ka Seme'. Below the table, there are dropdown menus for 'Province*' (Northern Cape), 'District*' (Pixley Ka Seme), 'Municipality*' (SIYATHEMBA), and 'Ward*' (105). At the bottom are buttons for 'Add', 'Edit', 'Cancel', 'Save', and 'Print'.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the NPO Operation Area details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

4. The capturing official can delete an operation area from the list.
4.1. Click "Delete" from the grid, for the one that you want to delete.

This screenshot is similar to the previous one, but the 'Delete' button in the 'NPO operation areas' table is highlighted with a red circle. The table shows the same data: Ward 105, Municipality Makhado & Molemole, District Pixley Ka Seme. The 'Save' and 'Delete' buttons are visible next to each row.

5. The capturing official can print HCBC Information Form, which should be used as a cover page of the NPO Report.
- 5.1. Click "**Print**" button.

The screenshot shows a web interface for capturing HCBC information. At the top, there's a 'Home' link and a 'Search Organisation' section with a dropdown for 'HCBC Number' and 'Search' and 'Clear' buttons. Below this is the 'HCBC Organisation Details' section with fields for 'HCBC Number' (74), 'Name of Organisation' (Mzekelo Omhle), and 'Date Established' (05/07/2007). There are tabs for 'Organisation Details', 'Address Details', 'Contact Details', and 'NPO Operation Areas'. The 'NPO Operation Areas' section shows a table with columns 'Ward', 'Municipality', and 'District'. The 'Print' button is circled in red.

6. HCBC Information Form will be displayed.

N03a: HCBC Information Form (Cover Page)

This form should be used as a cover page of the NPO report.
Replace with the computer printed form once you receive it.
Modifications should be done directly on the form with RED pens.

NPO Details

*1. HCBC Organisation Name : Mzekelo Omhle

*2. NPO Registration Number :

HCBC Number : 74

2a. Date Registered : 2b. Date Established : 05/07/2007

*3. HCBC Office

a. Location	Postal Address	Physical Address
Province	Northern Cape	Northern Cape
District	Pixley Ka Seme	Pixley Ka Seme
Sub-district	SIYATHEMBA	THEMBELIHLE

b. Addresses :	Postal Address	Physical Address
P.O.Box/Street :	P.O. Box 20	10 Wood Street
Suburb/Village :		
City/Town :	Prieska	Hopetown
Code :	4484	4514

*4. Contact Details

a. Manager / Contact Person Name : Bukeka Dyasi

b. Telephone : (053) 537-2099

c. Cellphone : (081) 323-2121

d. Fax :

e. Email / web address : www.mzekelo.gov.za

*5. NPO Operation Area (By Ward / Local Municipality)

Ward / Local Municipality
1 105 /Makhado & Molemole

*6. Health Care Facilities to which the organisation is linked (facility name as in DHIS)

a. Nearest Hospital :

b. Nearest CHCs :

c. Clinics :

7. Once all NPO Operation Area have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the Registration screen, and complete all the forms that require Organisation data.

Chapter 2: Registration

Learning unit 3: Personnel Registration

Outcomes

- ✓ Capture Personnel information on the system.
- ✓ Edit previously captured Organisation information

1. Personnel Maintenance

1. To proceed, the Capturing official should click on the text next sub-menu of Registration called "**Personnel**", below "**HCBC Organisation**" sub-menu.

The screenshot shows the 'Home Community Based' web application. The left sidebar menu includes 'Registration', 'HCBC Organisation', and 'Personnel'. The 'HCBC Organisation' sub-menu is selected, showing 'HCBC Organisation Details' for HCBC Number 85, Name of Organization 'Abongile', and Date Established '02/03/2009'. Below this, there is a section for 'NPO operation areas' with a table showing 'Ward 218', 'Municipality Durban Metro Unity', and 'District Durban'. The table has a 'Delete' button next to it. Below the table, there are dropdown menus for 'Province*' (Kwazulu-Natal), 'District*' (Durban), 'Municipality*' (Durban Metro Unity), and 'Ward*' (218). At the bottom, there are buttons for 'Add', 'Edit', 'Cancel', 'Save', and 'Print'.

2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

2.1. Click the "Add" button

2.2. Click in each field to capture the personnel details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- **Type of ID:** Capturer select from the pre-loaded list
- **ID Number:** This field depend on the Type of ID field
- **Name**
- **Surname**
- **Role:** Capturer select from the pre-loaded list
- **Other (Specify):** If role is not on the list.
- **Is the member disabled**

- **Assigned Province:** Capturer select from the pre-loaded list
- **Assigned District:** this field depends on the Province field, the system will only populate district that belong to the selected Province.
- **Date joined**
- **Data Capturer:** Automatically display the person currently logged in.
- **View Previous Role History**

3.2 Click the "Save" button

The screenshot shows a web-based form for personnel registration. At the top, there's a 'Search Organisation' section with a dropdown for 'HCBC Number' and 'Search'/'Clear' buttons. Below this is the 'HCBC Organisation Details' section, which includes fields for 'HCBC Number' (74), 'Name of Organisation' (Mzekelo Omhle), and 'Date Established' (05/07/2007). The main section is 'N03b : Personnel Registration'. It has two columns of fields. The left column includes 'Type of ID*' (dropdown), 'Name*' (text), 'Role*' (dropdown with options: SA ID, Passport, Drivers Licence, Permit), 'Gender*' (dropdown), 'Assigned Province*' (dropdown), 'Date of Joining' (text), and a 'View Previous Role History?' checkbox. The right column includes 'ID Number*' (text), 'Surname*' (text), 'Other(specify)' (text), 'Is the member disabled?' (dropdown), 'Assigned District*' (dropdown), and 'Data Capturer' (text). At the bottom, there are buttons for 'Add', 'Edit', 'Cancel', and 'Save'. The 'Save' button is circled in red.

3. All Personnel details are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Personnel Maintenance details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

- Once all Personnel details have been captured and saved correctly, the Capturer should proceed through the sub menus from left to right on the Registration screen, and complete all the forms that require Organisation data.

2. Qualification/Training Status

1. To proceed to the next form, the capturing official should click on the text hyperlink "**Qualification/Training Status**", adjacent to "**Maintain Personnel**". "**Qualification/Training Status**" is the second sub menu of the "**Personnel**" main menu button.

2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

3. A list of all Personnel in the organisation currently being captured will be displayed.
4. Click the "**Select**" next to the details of the person whose details need to be updated
5. Click the "**Add**" button

Home Community-Based Care

Search Organisation
HCBC Number: [dropdown] Search Clear

HCBC Organisation Details
HCBC Number: 148
Name of Organisation: Prime Time
Date Established: 10/05/2006

Maintain Personnel | Qualification/Training Status |

Personnel Data

ID Number	Role	Surname	Name	Date Joined
Select 123454321	Caregiver	Zabo	Nompilo	20/10/2006
Select 212456524	Caregiver	Zokwe	Mandisi	23/08/2007

1

ID Number*: 212456524 Role*: Caregiver
Name*: Mandisi Surname*: Zokwe

Add Qualification/ Training(SA DSD/DoH)

Qualification/Training*: Please select below
Type*: --please select below--

Add Edit Cancel Save

View Member Training History >

6. Click in each field to capture the Qualification/Training OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- **Qualification/Training:** Capturer select from the pre-loaded list
- **Type:** this field depends on the Qualification/Training field.
- **View Member Training History:**

7. Click the "Save" button

Search Organisation
HCBC Number: [dropdown] Search Clear

HCBC Organisation Details
HCBC Number: 148
Name of Organisation: Prime Time
Date Established: 10/05/2006

Maintain Personnel | Qualification/Training Status |

Personnel Data

ID Number	Role	Surname	Name	Date Joined
Select 123454321	Caregiver	Zabo	Nompilo	20/10/2006
Select 212456524	Caregiver	Zokwe	Mandisi	23/08/2007

1

ID Number*: 212456524 Role*: Caregiver
Name*: Mandisi Surname*: Zokwe

Add Qualification/ Training(SA DSD/DoH)

Qualification/Training*: Please select below
Type*: --please select below--

Add Edit Cancel Save

View Member Training History >

8. All Qualification/Training are saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out. The system will display a list of all Qualification/Training captured for the selected person.

Search Organisation
 HCBC Number Search Clear

HCBC Organisation Details

HCBC Number: 148
 Name of Organisation: Prime Time
 Date Established: 10/05/2006

Maintain Personnel | Qualification/Training Status
Qualification details saved successfully

ID Number	Role	Surname	Name	Date Joined
Select 123454321	Caregiver	Zabo	Nompilo	20/10/2006
Select 213456534	Caregiver	Zokwe	Mandisi	23/08/2007

ID Number*: 213456534 Role*: Caregiver
 Name*: Mandisi Surname*: Zokwe

Add Qualification/ Training(SA DSD/Doh) for Mandisi Zokwe

Qualification/Training	Status
Select Basic HIV and AIDS counselling Training	Enrolled
Select 29/69 day	Qualified

Qualification/Training*: 29/69 day
 Type*: Qualified

Add Edit Cancel Save

View Member Training History >

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Qualification/Training details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

Learning unit 4: Reassign

Outcomes

- ✓ Reassign member of Organisation from one level to another.
- ✓ Reassign member from one Organisation to another.

1. Reassign Personnel

1. To proceed, the Capturing official should click on the text next sub-menu of Registration called "**Reassign**", below "**Personnel**" sub-menu.

The screenshot shows the HCBC web application interface. The top header includes the South African coat of arms, the text 'social development', 'Department: Social Development', 'REPUBLIC OF SOUTH AFRICA', and 'Home Cor'. Below the header, the left navigation menu is visible with the following items: 'REGISTRATION', '>>HCBC Organisation', '>> Personnel', '>> Reassign' (highlighted with a red circle), 'ORGANISATION REPORTS', 'PRINT BLANK FORMS', 'MANAGEMENT', '>>Funding Information', '>> M&E Meetings', '>> Supervisory Visits', '>> Problem Tracking', '>> Sign-off Report', and 'GENERATE REPORTS'. The main content area shows a 'Search Organisation' section with a dropdown for 'HCBC Number' and buttons for 'Search' and 'Clear'. Below this is the 'HCBC Organisation Details' section with fields for 'HCBC Number' (148), 'Name of Organisation' (Prime Time), and 'Date Established' (10/05/2006). A message states '| Maintain Personnel | Qualification/Training Status | Qualification details saved successfully'. At the bottom, there is a 'Personnel Data' table with columns: ID Number, Role, Surname, Name, and Date Joined. The table contains two rows of data: one for ID 123454321 (Caregiver Zabo Nompilo, 20/10/2006) and another for ID 213456534 (Caregiver Zokua Mandisi, 23/08/2007).

ID Number	Role	Surname	Name	Date Joined
123454321	Caregiver	Zabo	Nompilo	20/10/2006
213456534	Caregiver	Zokua	Mandisi	23/08/2007

2. The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

REPUBLIC OF SOUTH AFRICA
TODAY'S DATE : 01/12/2009

Registration
HCBC Organisation
Personnel
Reassign
Organisation Reports
Print Blank Forms
Management
Funding Information
M&E Meetings
Supervisory Visits

Search Organisation
HCBC Number Search Clear

HCBC Organisation Details
HCBC Number 74
Name of Organization Mzekelo Omhle
Date Established 05/07/2007

Organization Details | Address Details | Contact Details | M&E Operation Areas

*** No results were found for HCBC Number 74 ***

Contact Details

3. The Capturing Official can reassign a member to another level or to another organisation.

- Search either by member's ID Number or Surname or HCBC Name
- Click on the dropdown arrow and select preferred option.
- Enter information according to the selected search criteria.
- Click "Search" button

social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

Home Community Base

TODAY'S DATE : 01/12/2009

REGISTRATION
>> HCBC Organisation
>> Personnel
>> Reassign

ORGANISATION REPORTS
PRINT BLANK FORMS
MANAGEMENT
>> Funding Information
>> M&E Meetings
>> Supervisory Visits
>> Problem Tracking
>> Sign-off Report
GENERATE REPORTS

Reassign Personnel
Search By: HCBC Name
ID Number
Surname
HCBC Name

Please select

ID Number
Name
Surname
HCBC Number
Organisation

New HCBC / New Role
HCBC Number Show NPC Name

Assign Cancel

View History ? ☐

Note: If the capturer searched by ID Number, Member's details will be displayed.
If the capturer searched by Surname, everyone in the database with that surname, their details will be displayed.
If the capturer searched by HCBC Name, details of all the Members in that organisation will be displayed.

- Click "Select" next to the details of the member.

Department: Social Development
REPUBLIC OF SOUTH AFRICA

TODAY'S DATE : 03/12/2009

REGISTRATION

>> HCBC Organisation

>> Personnel

>> Reassign

Reassign Personnel

Search By: ID Number 1234567891234 Search Clear

Member re-assigned successfully

ID Number	Name	Surname	Role	Date Joined
Select 1234567891234	Bulelwa	Zwedala	Manager	03/12/2009

PRINT BLANK FORMS

MANAGEMENT

>> Funding Information

>> M&E Meetings

>> Supervisory Visits

>> Problem Tracking

>> Sign-off Report

GENERATE REPORTS

Role* Manager

HCBC Number Show NPO Name

Assign Cancel

View History ? ☒

HCBC Number	Prev. Organisation	Date Joined	Role	Date Re-assigned	Re-assigned By
74	Mzekelo Omhle	05/12/2007	Manager	03/12/2009	Ntsiki Ntwana

DOWNLOAD DATA / EXPORTS

MAINTENANCE

HELP

MAIN MENU

LOGOUT

4. Click in each field to capture the Reassignment information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of Health, and may change from time to time.

- **Role**
- **HCBC number**
- Click **"Show NPO Name"**.
- HCBC Name and Date of joining the Organisation are displayed.
- Click **"Assign"** next to the details of the member.

Department: Social Development
REPUBLIC OF SOUTH AFRICA

TODAY'S DATE : 03/12/2009

REGISTRATION

>> HCBC Organisation

>> Personnel

>> Reassign

Reassign Personnel

Search By: ID Number 1234567891234 Search Clear

ID Number	Name	Surname	Role	Date Joined
Select 1234567891234	Bulelwa	Zwedala	Manager	05/12/2007

PRINT BLANK FORMS

MANAGEMENT

>> Funding Information

>> M&E Meetings

>> Supervisory Visits

>> Problem Tracking

>> Sign-off Report

GENERATE REPORTS

Role* Manager

HCBC Number 64 Show NPO Name

HCBC Name Zithulele Nomathamsanga

Date of joining the organisation 03/12/2009

Assign Cancel

View History ? ☐

DOWNLOAD DATA / EXPORTS

MAINTENANCE

HELP

MAIN MENU

LOGOUT

5. Information saved to the database. The system displays an information message to the Capturer regarding the saved status of the record. All fields are greyed out.

The screenshot shows the 'Reassign Personnel' form in the HCBC system. A red circle highlights the message 'Member re-assigned successfully'. The form includes a search bar with 'ID Number' selected and '1234567891234' entered. Below the message, there is a table showing the member's details:

ID Number	Name	Surname	Role	Date Joined
1234567891234	Bulelwa	Zwedala	Manager	03/12/2009

The form also includes sections for 'New HCBC / New Role' with fields for 'Role*' (set to Manager) and 'HCBC Number' (74), and a 'View History' table showing the member's previous assignments.

HCBC Number	Prev. Organisation	Date Joined	Role	Date Re-assigned	Re-assigned By
74	Mzekelo Omhle	05/12/2007	Manager	03/12/2009	Ntsiki Ntwana

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Member's re-assignment details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

Chapter 3: Organisation Reports

The **Home Community-Based Care** requires the capturing official to capture the Organisation reports.

This is the second option of HCBC main menu with its submenus listed below it.

The major functions of the "Organisation Reports" include the following:

1. Capture and validate Organisation Reports
2. Capture Monthly Stipend
3. Capture Monthly Service
4. Capture Quarterly Reports

Chapter 3: Organisation Reports

Learning unit 1: Organisation Report

Outcomes

- ✓ Capture and validate Organisation Reports
- ✓ Amend Organisation Reports that were previously captured

1. Organisation Report

To proceed, the Capturing official should click on the next option of the main menu **"Organisation Reports"**, below **"Reassign"** sub-menu.

The screenshot shows the HCBC system interface. On the left sidebar, the menu item 'ORGANISATION REPORTS' is highlighted with a red circle. The main content area shows the 'Reassign Personnel' section with a search bar containing '1234567891234' and a 'Search' button. Below the search bar, a message states 'Member re-assigned successfully'. A table displays the following data:

ID Number	Name	Surname	Role	Date Joined
Select: 1234567891234	Bulelwa	Zwedala	Manager	03/12/2009

Below the table, there are input fields for 'ID Number' (1234567891234), 'Name' (Bulelwa), 'Surname' (Zwedala), 'HCBC Number' (74), and 'Organisation' (Mzekelo Omhle). At the bottom, there is a 'New HCBC / New Role' section with a 'Role*' dropdown menu set to 'Manager'.

The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

Search Organisation
 HCBC Number Search Clear

HCBC Organisation Details

HCBC Number

Name of Organisation

Date Established

| Organisation Details | Address | Person | Contact Details | SDG Operation Areas |

*** No results were found for HCBC Number 74 ***

Contact Details

Click the “Add” button

Home Community

Organisation Reports

Search Organisation
 HCBC Number Search Clear

HCBC Organisation Details

HCBC Number

Name of Organisation

Date Established

| Organisation report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report | Annual Report |

Organisation Report details not yet captured

Reporting Year*

Reporting Month*

Date received

Date validated

Data valid at the time of first submission ☐ Yes ☒ No

Date Captured

Data Capturer

Date capturing completed

Add Edit Cancel Save

Click in each field to capture the Organisation Report details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field’s label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Reporting Year**
- **Reporting Month**
- **Date of received**
- **Date of validated**
- **Date valid at the time of first submission**
- **Date Captured:** defaulted to today’s date
- **Data Capturer:** Automatically display the person currently logged in.
- **Date Capturing Completed**

Click the “Save” button

social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

Home Community

TODAY'S DATE : 05/12/2009

REGISTRATION
>> HCBC Organisation
>> Personnel
>> Reassign

ORGANISATION REPORTS
PRINT BLANK FORMS
MANAGEMENT
>> Funding Information
>> M&E Meetings
>> Supervisory Visits
>> Problem Tracking
>> Sign-off Report

GENERATE REPORTS
DOWNLOAD DATA / EXPORTS
MAINTENANCE
HELP

Organisation Reports
Search Organisation
HCBC Number: [148] Search Clear

HCBC Organisation Details
HCBC Number: 148
Name of Organization: Prime Time
Date Established: 10/05/2006

[Organisation report] Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report | Annual Report

Reporting Year*: 2009
Reporting Month*: November
Date received: 02/12/2009
Date validated: 04/12/2009
Data valid at the time of first submission: ☒ Yes ☐ No
Date Captured: 05/12/2009
Data Capturer: Ntiki Ntwana
Date capturing completed: 05/12/2009

Add Edit Cancel **Save**

All Organisation Reports details are saved to the database. The system displays a list of all reports received and captured.

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Home Community

TODAY'S DATE : 05/12/2009

REGISTRATION
>> HCBC Organisation
>> Personnel
>> Reassign

ORGANISATION REPORTS
PRINT BLANK FORMS
MANAGEMENT
>> Funding Information
>> M&E Meetings
>> Supervisory Visits
>> Problem Tracking
>> Sign-off Report

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Organisation Reports
Search Organisation
HCBC Number: [148] Search Clear

HCBC Organisation Details
HCBC Number: 148
Name of Organization: Prime Time
Date Established: 10/05/2006

[Organisation report] Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report | Annual Report

Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select	2009 November	02/12/2009	09/12/2009	N	Ntiki Ntwana	05/12/2009
Select	2009 October	04/11/2009	05/11/2009	Y	Ntiki Ntwana	05/12/2009
Select	2009 September	01/10/2009	02/10/2009	Y	Ntiki Ntwana	05/12/2009

Reporting Year*: 2009
Reporting Month*: September
Date received: 01/10/2009
Date validated: 02/10/2009
Data valid at the time of first submission: ☒ Yes ☐ No
Date Captured: 05/12/2009
Data Capturer: Ntiki Ntwana
Date capturing completed: 05/10/2009

Add Edit Cancel Save

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Organisation Report details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

2. Monthly Stipend

To proceed, the capturing official should click on the text hyperlink **"Monthly Stipend"**, adjacent to **"Organisation Report"**. **"Monthly Stipend"** is the second sub menu of the **"Organisation Reports"** main menu button.

Note: The capturing official can not capture in this page if there is no information captured in the Organisation report page.

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TODAYS DATE : 05/12/2009

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Organisation Reports
 Search Organisation
 HCBC Number Search Clear

HCBC Organisation Details
 HCBC Number: 148
 Name of Organization: Prime Time
 Date Established: 01/10/2009

Organisation Report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report | Annual Report

	Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select	2009	November	02/12/2009	03/12/2009	N	Ntsiki Ntwana	05/12/2009
Select	2009	October	04/11/2009	05/11/2009	Y	Ntsiki Ntwana	05/12/2009
Select	2009	September	01/10/2009	02/10/2009	Y	Ntsiki Ntwana	05/12/2009

1

Reporting Year* 2009
 Reporting Month* September
 Date received 01/10/2009
 Date validated 02/10/2009
 Data valid at the time of first submission ☒ Yes ☐ No
 Date Captured 05/12/2009
 Data Capturer Ntsiki Ntwana
 Date capturing completed 05/10/2009

Add Edit Cancel Save

The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

REPUBLIC OF SOUTH AFRICA

TODAYS DATE : 01/12/2009

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 HCBC Organisation
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 Supervisory Visits

Search Organisation
 HCBC Number Search Clear

HCBC Organisation Details
 HCBC Number: 74
 Name of Organization: Mzekelo Omhle
 Date Established: 05/07/2007

Organisation Details | Address Details | Contact Details | NPO Operation Areas |

*** No results were found for HCBC Number 74 ***

Contact Details

Click the **"Add"** button

social development
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Home Comm

TODAY'S DATE : 05/12/2009

REGISTRATION

>>HCBC Organisation

>> Personnel

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>> M&E Meetings

>> Supervisory Visits

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N01 : Monthly Stipend Information

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number 148

Name of Organisation Prime Time

Date Established 10/05/2006

Organisation Report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report

No Stipend details have been provided for this organisation.

Reporting Year* 2009

Reporting Month* November

Add

Click in each field to capture the Monthly Stipend details OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Reporting Year**
- **Reporting Month**

Click the "**Select**" next to the month that needs to be captured or updated

REPUBLIC OF SOUTH AFRICA

TODAY'S DATE : 05/12/2009

REGISTRATION

>> HCBC Organisation

>> Personnel

>> Reassign

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>> Supervisory Visits

>> Problem Tracking

>> Sign-off Report

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N01 : Monthly Stipend Information

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number: 148

Name of Organisation: Prime Time

Date Issued: 10/03/2008

Organisation Report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report

Stipend details have been added successfully

Stipend reports previously captured

Select	Reporting Year	Reporting Month
1	2009	September

Reporting Year* 2009

Reporting Month* September

Add Edit Cancel Save Print N01 form

Click **"Select"** next to the name of the person to load stipend for.

>> Supervisory Visits

>> Problem Tracking

>> Sign-off Report

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Stipend reports previously captured

Select	Reporting Year	Reporting Month
1	2009	September

Reporting Year* 2009

Reporting Month* Please select below

Add Edit Cancel Save Print N01 form

Stipend Details for Reporting Month: September 2009

Select	ID Number	Firstname and Surname	Status	a. Dept Health	b. Dept. Social Development	c. Own (Org)	d. Other	TOTAL
1	213456534	Mandisi Zokwe		R 0.00	R 0.00	R 0.00	R 0.00	
2		Nomali Qhude		R 0.00	R 0.00	R 0.00	R 0.00	
3	123454321	Nompilo Zabo		R 0.00	R 0.00	R 0.00	R 0.00	
		TOTAL		R 0.00	R 0.00	R 0.00	R 0.00	R 0.00

1

Payment Details for individual

ID Number 213456534

Surname Zokwe First name Mandisi

Status for the reporting month* Please select below

Dept. of Health R0.0 Dept. of Soc Dev R0.0

Own R0.0 Other R0.0

Add Payment Edit Payment Save Payment Cancel Payment

Click **"Add Payment"** to load Monthly Stipend.

>> Supervisory Visits

>> Problem Tracking

>> Sign-off Report

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Stipend reports previously captured

Select	Reporting Year	Reporting Month
1	2009	September

Reporting Year*

Reporting Month*

Stipend Details for Reporting Month: September 2009

-	ID Number	Firstname and Surname	Status	a. Dept Health	b. Dept. Social Development	c. Own (Org)	d. Other	TOTAL
Select	213456534	Mandisi Zokwe		R 0.00	R 0.00	R 0.00	R 0.00	
Select		Nomali Qhude		R 0.00	R 0.00	R 0.00	R 0.00	
Select	123454321	Nompile Zabo		R 0.00	R 0.00	R 0.00	R 0.00	
		TOTAL		R 0.00	R 0.00	R 0.00	R 0.00	R 0.00

1

Payment Details for individual

ID Number

Surname First name

Status for the reporting month*

Dept. of Health Dept. of Soc Dev

Own Other

Click in each field to capture the Monthly Stipend OR use the drop down lists to select the appropriate option.

Status for the reporting month

Dept. of health

Dept of Soc Dev

Own

Other

Click **"Save Payment"** button

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Stipend Details for Reporting Month: September 2009

-	ID Number	Firstname and Surname	Status	a. Dept Health	b. Dept. Social Development	c. Own (Org)	d. Other	TOTAL
Select	213456534	Mandisi Zokwe		R 0.00	R 0.00	R 0.00	R 0.00	
Select		Nomali Qhude		R 0.00	R 0.00	R 0.00	R 0.00	
Select	123454321	Nompile Zabo		R 0.00	R 0.00	R 0.00	R 0.00	
		TOTAL		R 0.00	R 0.00	R 0.00	R 0.00	R 0.00

1

Payment Details for individual

ID Number

Surname First name

Status for the reporting month*

Dept. of Health Dept. of Soc Dev

Own Other

Click **"Save"** button

Local Development
REPUBLIC OF SOUTH AFRICA

ODAYS DATE : 05/12/2009

REGISTRATION

- >> HCBC Organisation
- >> Personnel
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N01: Monthly Stipend Information

Search Organisation

HCBC Number

HCBC Organisation Details

HCBC Number:

Name of Organisation:

Date Established:

| Organisation Report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report | Annual

Stipend reports previously captured

Select	Reporting Year	Reporting Month
1	2009	September

Reporting Year*

Reporting Month*

Stipend Details for Reporting Month: September 2009

ID Number	Firstname and Surname	Status	a. Dept Health	b. Dept. Social Development	c. Own (Org)	d. Other	TOTAL
-----------	-----------------------	--------	----------------	-----------------------------	--------------	----------	-------

All details for that Month Stipend are saved to the database. The system displays a list of all reports received and captured.


Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

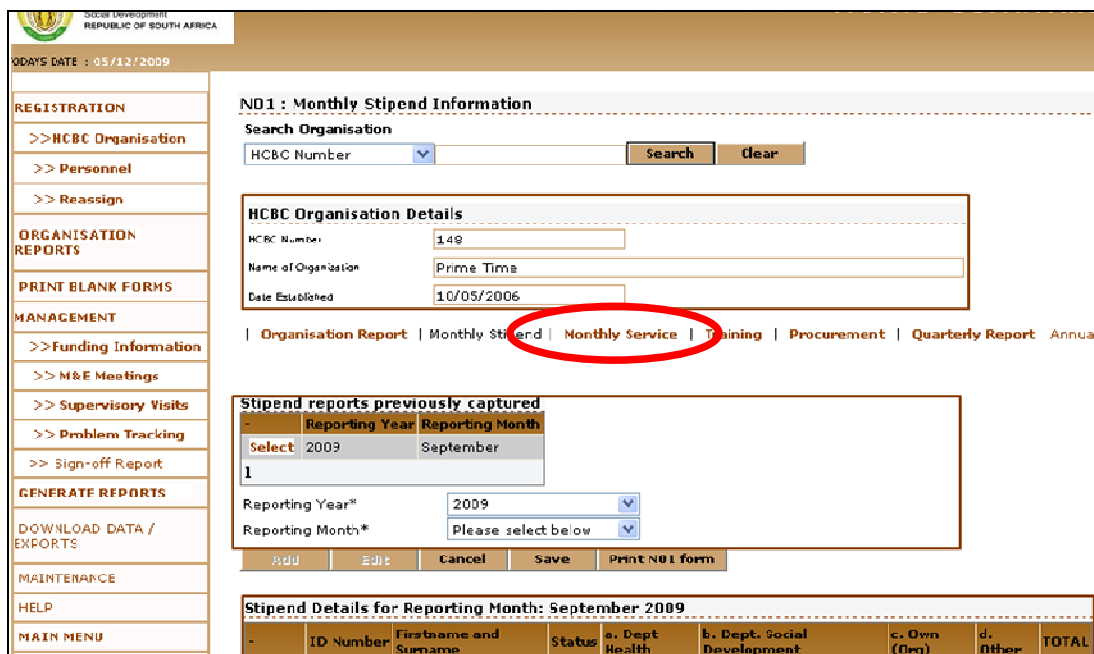
If there are errors in the Monthly Stipend details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

3. Monthly Service

To proceed, the capturing official should click on the text hyperlink **"Monthly Service"**, adjacent to **"Monthly Stipend"**. **"Monthly Service"** is the second sub menu of the **"Organisation Reports"** main menu button.

 **Note:** The capturing official can not capture in this page if there is no information captured in the Organisation report page.



ND1 : Monthly Stipend Information

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number	149
Name of Organisation	Prime Time
Date Established	10/05/2006

Organisation Report | Monthly Stipend | **Monthly Service** | Training | Procurement | Quarterly Report | Annual

Stipend reports previously captured

Select	Reporting Year	Reporting Month
1	2009	September

Reporting Year*

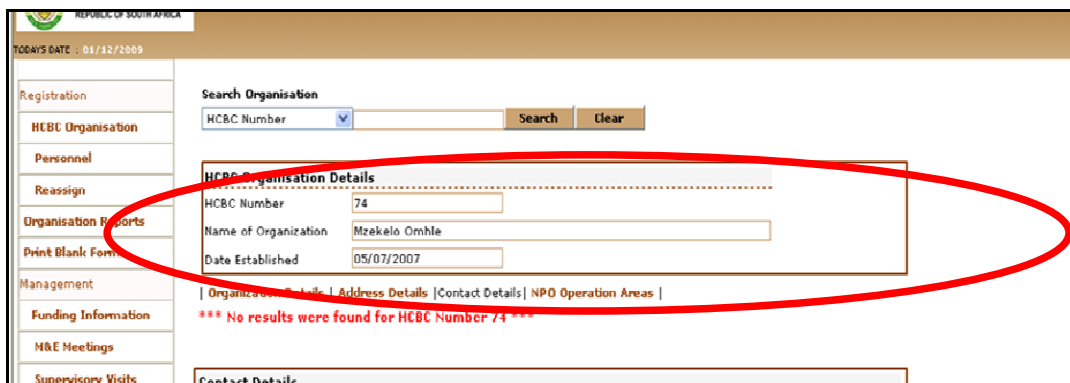
Reporting Month*

Add Edit Cancel Save Print N01 form

Stipend Details for Reporting Month: September 2009

ID Number	Firstname and Surname	Status	a. Dept Health	b. Dept. Social Development	c. Own (Org)	d. Other	TOTAL
-----------	-----------------------	--------	----------------	-----------------------------	--------------	----------	-------

The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.



ND1 : Monthly Stipend Information

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number	74
Name of Organisation	Mzekelo Omhle
Date Established	05/07/2007

Organisation Report | Address Details | Contact Details | NPO Operation Areas |

*** No results were found for HCBC Number 74 ***

Contact Details

Click the **"Select"** next to the month that needs to be captured or updated

The screenshot shows the 'Home Community' interface with a sidebar menu on the left. The main content area displays the 'Monthly Supervisor Report' table. The table has columns: Year, Month, Date Received, Date Validated, Data valid, Data Capturer, and Date Captured. The first row is 'Select 2009 November 02/12/2009 03/12/2009 N Ntsiki Ntwana 05/12/2009'. The 'Select' button next to 'November' is circled in red. Below the table are dropdown menus for Reporting Year, Reporting Month, Operating Province, Operating District, and Sub-district/Local Municipality.

Click **"Add"** to load Monthly Services.

The screenshot shows the 'Home Community' interface. The 'Add' button in the 'Monthly Supervisor Report' table is circled in red. Below the table, there is a message: 'No Report details have been provided for this Reporting Month : November'. The table structure is the same as in the previous screenshot.

Click in each field to capture the Monthly Services OR use the drop down lists to select the appropriate option.

Operating Province

Operating Province

Sub-district/Local Municipality

Reporting Items

Click **"Save"** button

>> Personnel

>> Reassign

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>> Supervisory Visits

>> Problem Tracking

>> Sign-off Report

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HCBC Organisation Details
 HCBC Number: 148
 Name of Organisation: Prime Time
 Date Established: 10/05/2006


| Organisation Report | Quarterly Report | Monthly Service | Training | Procurement | Quarterly Report

S03 : Monthly Supervisor Report

Select	Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select	2009	November	02/12/2009	03/12/2009	N	Ntsiki Ntvana	05/12/2009
Select	2009	October	04/11/2009	05/11/2009	Y	Ntsiki Ntvana	05/12/2009
Select	2009	September	01/10/2009	02/10/2009	Y	Ntsiki Ntvana	05/12/2009

Reporting Year*: 2009
 Reporting Month*: December
 Operating Province*: Northern Cape
 Operating District*: Frances Baard
 Sub-district/Local Municipality*: MAGARENG

Reporting Items	Total
**1. Household visits (= 1.1 + 1.2)	0
**1.1. beneficiary found	300
**1.2. beneficiary NOT found	10
*2. Supervised household visits	8
*3. Newly Identified Adult headed household	10
*4. Newly identified Child headed household	7
*5. Newly identified Adult beneficiaries	7
*6. Newly identified Children	50
*7. Clinic visits - accompanying patient	70
*8. School visits	86
*9. Referrals - for health facility	0
*10. Referrals - for vital documents	0
*11. Referrals - for psychosocial support	0
*12. Lay Counseling Conducted	0



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Home Community

TODAY'S DATE : 06/12/2009

REGISTRATION

>> HCBC Organisation

>> Personnel

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HELP

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LOGOUT

Search Organisation

HCBC Number

HCBC Organisation Details

HCBC Number:

Name of Organisation:

Date Established:

S03 : Monthly Supervisor Report

	Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select	2009	November	02/12/2009	03/12/2009	N	Ntsiki Ntwana	05/12/2009
Select	2009	October	04/11/2009	05/11/2009	Y	Ntsiki Ntwana	05/12/2009
Select	2009	September	01/10/2009	02/10/2009	Y	Ntsiki Ntwana	05/12/2009

Monthly Service details for Reporting Year: 2009 And Reporting Month : September

	Reporting Year	Reporting Month	Operating District	Sub-district/Local Municipality
Select	2009	December	Nelson Mandela Metropol	Mangaung

Reporting Items

Reporting Items	Total
**1. Household visits (= 1.1 + 1.2)	110
**1.1. beneficiary found	100
**1.2. beneficiary NOT found	10
*2. Supervised household visits	25
*3. Newly Identified Adult headed household	76
*4. Newly Identified Child headed household	97

All details for that Monthly Service are saved to the database. The system displays a list of all reports received and captured.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Monthly Services details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

4. Training

To proceed, the capturing official should click on the text hyperlink **"Training"**, adjacent to **"Monthly Service"**. **"Training"** is the forth sub menu of the **"Organisation Reports"** menu.

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Home Commu

TODAYS DATE : 03/03/2010

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Monthly Service

Search Organisation
HCBC Number Search Clear

HCBC Organisation Details
HCBC Number 201
Name of Organization Ntsiki Organisation
Date Established

Organisation Report | Monthly Stipend | Monthly Service | **Training** | Procurement | Quarterly Report | Annual Report |

Add Edit Save Print Cancel

503 : Monthly Supervisor Report

	Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select	2010	February	01/03/2010	02/03/2010	Y	Ntsiki Ntwana	03/03/2010
1							

Reporting Year* 2010
Reporting Month* March
Operating Province* Please select below
Operating District* Please select below
Sub-district/Local Municipality* Please select below

Add Edit Save Print Cancel

The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

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TODAYS DATE : 01/12/2009

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HCBC Organisation
Personnel
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Supervisory Visits

Search Organisation
HCBC Number Search Clear

HCBC Organisation Details
HCBC Number 74
Name of Organization Mzekelo Omhle
Date Established 05/07/2007

Organisation Details | Address Details | Contact Details | NPO Operation Areas |

*** No results were found for HCBC Number 74 ***

Contact Details

Click **"Add"** to load Training Page.

Click in each field to capture the Training Report OR use the drop down lists to select the appropriate option.

- **Training/Workshop Facilitating Organisation**
- **Course Accreditation Number (if accredited)**
- **Title of Training/Workshop**
- **Start Date**
- **End Date**
- **Duration (Hours)**
- **Type of training**
- **Brief Description of Course Content including Goal / Objectives / Expected Outcomes**

Click **"Save"** button

social development
Department
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Home Community E

TODAYS DATE : 04/03/2010

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Organisation Reports
Print Blank Forms
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Search Organisation
HCBC Number

HCBC Organisation Details
HCBC Number
Name of Organization
Date Established

N04: Training/Workshop/Seminar Form

S	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select	November	01/12/2009	02/12/2009	N	Ntsiki Ntwana	03/03/2010
1						

Training/Workshop Facilitating Organisation*
Course Accreditation Number(if accredited)
Title of Training/Workshop*
Start Date*
End Date*
Duration (Hours)

Type of training/workshop
Type of training*

Brief Description of Course Content including Goal / Objectives / Expected Outcomes

All details for that Training are saved to the database.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Training Report details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

5. Procurement

To proceed, the capturing official should click on the text hyperlink **"Procurement"**, adjacent to **"Training"**. **"Procurement"** is the fourth sub menu of the **"Organisation Reports"** main menu button.

ent
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Home Co

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number

Name of Organisation

Date Established

[Organisation Report](#) |
 [Monthly Stipend](#) |
 [Monthly Service](#) |
 [Training](#) |
 [Procurement](#) |
 [Quarterly Report](#)

Add Edit Save Print Cancel

S03 : Monthly Supervisor Report

	Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select	2009	November	02/12/2009	03/12/2009	N	Ntsiki Ntwana	05/12/2009
Select	2009	October	04/11/2009	05/11/2009	Y	Ntsiki Ntwana	05/12/2009
Select	2009	September	01/10/2009	02/10/2009	Y	Ntsiki Ntwana	05/12/2009

1

The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number

Name of Organisation

Date Established

[Organization Details](#) |
 [Monthly Stipend](#) |
 [Monthly Service](#) |
 [Training](#) |
 [Procurement](#) |
 [Quarterly Report](#)

*** No results were found for HCBC Number 74 ***

Contact Details

Select the month you want to capture.

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Home

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Search Organisation
HCBC Number Search Clear

HCBC Organisation Details
HCBC Number 84
Name of Organization Lilitha HCBC
Date Established 01/06/2009

| Organisation Report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report

NPD Monthly Procurement

Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select 2010 February	25/01/2010	25/01/2010	Y	Nyami Xotyeni	21/03/2010	
Select 2010 January	28/12/2009	29/12/2009	Y	Nyami Xotyeni	21/03/2010	

Person writing report*
Reporting Year* 2010
Reporting Month* March

Add Edit Cancel Save

Click "Add" to load Procurement Report page.

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TODAY'S DATE : 21/03/2010

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Search Organisation
HCBC Number Search Clear

HCBC Organisation Details
HCBC Number 84
Name of Organization Lilitha HCBC
Date Established 01/06/2009

| Organisation Report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report

No Procurement details have been provided for this Reporting Month : January

NPD Monthly Procurement

Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select 2010 February	25/01/2010	25/01/2010	Y	Nyami Xotyeni	21/03/2010	
Select 2010 January	28/12/2009	29/12/2009	Y	Nyami Xotyeni	21/03/2010	

Person writing report*
Reporting Year* 2010
Reporting Month* January

Add Edit Cancel Save

Click in each field to capture the Procurement Report OR use the drop down lists to select the appropriate option.

- **Items:** Select from the list

Please select below

Please select below

- Bandages
- Cough Mixture
- Female Condoms
- Food Parcels
- Food Supplements
- Gloves
- HBC Kits
- Pain Killers
- TB Medication
- Male Condoms

- **Number left from last month**
- **Number acquired this month**
- **Number distributed or consumed**
- **Number remaining this month**
- **Comment/Observations**

Click **"Save Items"** button

The screenshot shows the 'NPO Monthly Procurement' form. At the top, there are tabs for 'Organisation Report', 'Monthly Stipend', 'Monthly Service', 'Training', 'Procurement', 'Quarterly Report', and 'Annual Report'. The 'Procurement' tab is active. Below the tabs, there are sections for 'Year', 'Month', 'Date Received', 'Date Validated', 'Data valid', 'Data Captured', and 'Date Captured'. The 'Procurement details for Reporting Month : January' section includes fields for 'Report Writer', 'Year', and 'Month'. Below this, there are fields for 'Person writing report*', 'Reporting Year*', and 'Reporting Month*'. At the bottom, there are buttons for 'Add', 'Edit', 'Cancel', and 'Save'. The 'Items Procured' section shows a table with columns for 'Items', 'Number left from last month', 'Number acquired this month', 'Number distributed or consumed', and 'Number remaining this month'. The 'Save Items' button is circled in red.

All Procurement details are saved to the database. The system displays a list of all items.

The screenshot shows the 'Procurement details for Reporting Month : January' form. It includes fields for 'Report Writer', 'Year', and 'Month'. Below these, there are fields for 'Person writing report*', 'Reporting Year*', and 'Reporting Month*'. At the bottom, there are buttons for 'Add', 'Edit', 'Cancel', and 'Save'. The 'Items Procured' section shows a table with columns for 'Items', 'Number left from last month', 'Number acquired this month', 'Number distributed or consumed', and 'Number remaining this month'. The 'Save Items' button is circled in red.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Procurement Report details OR it is necessary to change them, the capturing official concerned should click on the **"Edit Items"** button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the **"Save"** button is not clicked, changes to any field will not be updated in the database. As per the **"Add"** procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The **"Cancel"** button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the **"Cancel"** button.

6. Quarterly Report

To proceed, the capturing official should click on the text hyperlink **"Quarterly Report"**, adjacent to **"Procurement"**. **"Quarterly Report"** is the second sub menu of the **"Organisation Reports"** main menu button.

The screenshot shows the HCBC web application interface. The top header includes the South African coat of arms, the text 'social development', 'Department: Social Development', 'REPUBLIC OF SOUTH AFRICA', and a 'Home Co' link. Below the header, the date 'TODAY'S DATE : 06/12/2009' is displayed. The left sidebar contains a navigation menu with sections: 'REGISTRATION' (with links to '>>HCBC Organisation', '>> Personnel', and '>> Reassign'), 'ORGANISATION REPORTS' (with links to 'PRINT BLANK FORMS', 'MANAGEMENT', '>>Funding Information', '>> M&E Meetings', '>> Supervisory Visits', and '>> Problem Tracking'), 'GENERATE REPORTS', and 'DOWNLOAD DATA / EXPORTS'. The main content area has a 'Search Organisation' section with a dropdown for 'HCBC Number' and 'Search'/'Clear' buttons. Below this is the 'HCBC Organisation Details' section, which is populated with: 'HCBC Number: 148', 'Name of Organization: Prime Time', and 'Date Established: 10/05/2006'. A navigation bar below the details section includes links: 'Organisation Report', 'Monthly Stipend', 'Monthly Service', 'Training', 'Procurement', and 'Quarterly Report' (which is circled in red). Below the navigation bar are buttons: 'Add', 'Edit', 'Save', 'Print', and 'Cancel'. At the bottom, there is a table titled 'SD3 : Monthly Supervisor Report' with columns: Year, Month, Date Received, Date Validated, Data valid, Data Capturer, and Date Captured. The table contains three rows of data for the years 2009, 2009, and 2009, all with 'Ntsiki Ntwana' as the data capturer.

The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

The screenshot shows the HCBC web application interface. The top header includes the South African coat of arms, the text 'REPUBLIC OF SOUTH AFRICA', and 'TODAY'S DATE : 01/12/2009'. The left sidebar contains a navigation menu with sections: 'Registration', 'HCBC Organisation', 'Personnel', 'Reassign', 'Organisation Reports', 'Print Blank Form', 'Management', 'Funding Information', 'M&E Meetings', and 'Supervisory Visits'. The main content area has a 'Search Organisation' section with a dropdown for 'HCBC Number' and 'Search'/'Clear' buttons. Below this is the 'HCBC Organisation Details' section, which is highlighted with a red oval. It contains: 'HCBC Number: 74', 'Name of Organization: Mzekelo Omhle', and 'Date Established: 08/07/2007'. Below the details section is a navigation bar with links: 'Organisation Details', 'Address Details', 'Contact Details', and 'NPD Operation Areas'. Below the navigation bar is a red message: '*** No results were found for HCBC Number 74 ***'. At the bottom, there is a 'Contact Details' section.

Click **"Add"** to load Quarterly Report.

The screenshot shows the 'Home Community' interface for the Department of Social Development, Republic of South Africa. The left sidebar contains navigation links: REGISTRATION, ORGANISATION REPORTS, PRINT BLANK FORMS, MANAGEMENT, GENERATE REPORTS, DOWNLOAD DATA / EXPORTS, MAINTENANCE, HELP, and MAIN MENU. The 'MANAGEMENT' section is expanded, showing 'Funding Information' with an 'Add' button circled in red. Other options include '>> M&E Meetings', '>> Supervisory Visits', '>> Problem Tracking', and '>> Sign-off Report'. The main content area shows a 'Search Organisation' section with a dropdown for 'HCBC Number' and 'Search'/'Clear' buttons. Below this is the 'HCBC Organisation Details' section with fields for 'HCBC Number' (148), 'Name of Organisation' (Prime Time), and 'Date Established' (10/05/2006). A navigation bar includes links for 'Organisation Report', 'Monthly Stipend', 'Monthly Service', 'Training', 'Procurement', 'Quarterly Report', and 'Annual Report'. The 'Quarterly Report' link is active, leading to the 'N08:Quarterly Report' form. This form includes dropdowns for 'Reporting Year*' (2009) and 'Reporting Quarter*' (- please select below -). Below these are two text input fields for 'Total number of household EXITED the HCBC programme during this quarter' and 'Total number of beneficiaries EXITED the HCBC programme during this quarter'. The form concludes with a note: 'Please fill in the following information from household master register notebook. (Some households exited, some newly identified, some continuing after all these movements, count the--'.


Click in each field to capture the Quarterly Report OR use the drop down lists to select the appropriate option.

Reporting Year

Reporting Quarter

Reporting Information

Click **"Save"** button



social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

Home Community

TODAYS DATE : 06/12/2009

REGISTRATION

>> HCBC Organisation

>> Personnel

>> Reassign

ORGANISATION REPORTS

PRINT BLANK FORMS

MANAGEMENT

>> Funding Information

>> M&E Meetings

>> Supervisory Visits

>> Problem Tracking

>> Sign-off Report

GENERATE REPORTS

DOWNLOAD DATA / EXPORTS

MAINTENANCE

HELP

MAIN MENU

LOGOUT

Search Organisation

HCBC Number

HCBC Organisation Details

HCBC Number:

Name of Organization:

Date Established:

[Organisation Report](#) | [Monthly Stipend](#) | [Monthly Service](#) | [Training](#) | [Procurement](#) | [Quarterly Report](#) | [Annual Report](#)

N08:Quarterly Report

3a. Reporting Year*

3b. Reporting Quarter*

Please give the following figures using information archived in the "Exit HCBC section" and confirm with Master Registers

7. Total number of household EXITED the HCBC programme during this quarter

8. Total number of beneficiaries EXITED the HCBC programme during this quarter

**Please fill in the following information from household master register notebook.
(Some households exited, some newly identified, some continuing after all these movements, count the-- households which are active for the followings:)**

9. Total number of child-headed household at present

10. Total number of youth-headed household at present

11. Total number of household other than the above at present

Please fill in the following information from beneficiary master register notebook.

12. Total number of child-beneficiaries at present

13a. Total number of adult-beneficiaries at present(older person)

13b. Total number of adult-beneficiaries at present(not older person)

All details for that Quarterly Report are saved to the database. The system displays a list of all reports received and captured.

social development
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REPUBLIC OF SOUTH AFRICA

Home Community

TODAYS DATE : 06/12/2009

REGISTRATION

>> HCBC Organisation

>> Personnel

>> Reassign

ORGANISATION REPORTS

PRINT BLANK FORMS

MANAGEMENT

>> Funding Information

>> M&E Meetings

>> Supervisory Visits

>> Problem Tracking

>> Sign-off Report

GENERATE REPORTS

DOWNLOAD DATA / EXPORTS

MAINTENANCE

HELP

MAIN MENU

LOGOUT

Search Organisation

HCBC Number Search Clear

HCBC Organisation Details

HCBC Number: 148

Name of Organisation: Prime Time

Date Established: 10/05/2006

Organisation Report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly Report | Annual Report |

Quarterly Report saved successfully

N08:Quarterly Report

Reporting Year: 2009 Reporting Quarter: April - Jun

Select: 2009 April - Jun

1

3a. Reporting Year* 2009

3b. Reporting Quarter* April - June

Please give the following figures using information archived in the "Exit HCBC section" and confirm with Master Registers

7. Total number of household EXITED the HCBC programme during this quarter 17

8. Total number of beneficiaries EXITED the HCBC programme during this quarter 21

Please fill in the following information from household master register notebook.
(Some households exited, some newly identified, some continuing after all these movements, count the households which are active for the followings:)

9. Total number of child-headed household at present 7

10. Total number of youth-headed household at present 10

11. Total number of household other than the above at present 0

Please fill in the following information from beneficiary master register notebook.

12. Total number of child-beneficiaries at present 0

13a. Total number of adult-beneficiaries at present(older person) 0

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Quarterly Report details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

Chapter 4: Management

The **Home Community-Based Care** requires the capturing official to capture the Management Information.

This is the third option of HCBC main menu with its submenus listed below it.

The major functions of "**Management**" include the following:

1. Capture Funding Information
2. M&E Meeting
3. Supervisory Visit
4. Problem Tracking
5. Sign-off Report

Chapter 4: Management

Learning unit 1: Funding Information

Outcomes

- ✓ Capture information pertaining to funding of an Organisation
- ✓ Amend previously captured funding information
- ✓ Discontinue Funding
- ✓ Record Meeting
- ✓ Record Problem
- ✓ Meeting Report Generation
- ✓ Capture Supervisory Visit Summary

1. Funding Information

To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called **"Funding Information"**.

The screenshot displays the HCBC Home Community web application. The left sidebar contains a menu with the following items: REGISTRATION, PERSONNEL, ORGANISATION REPORTS, PRINT BLANK FORMS, and SUPERVISORY. The 'Funding Information' item under SUPERVISORY is circled in red. The main content area features a search bar for 'Search Organisation' with a dropdown for 'HCBC Number' and buttons for 'Search' and 'Clear'. Below this is a section for 'HCBC Organisation Details' with fields for 'HCBC Number' (148), 'Name of Organisation' (Drina Tima), and 'Date Established' (10/08/2005). A message states 'Quarterly Report saved successfully'. At the bottom, there is a section for 'NDB: Quarterly Report' with a table for 'Reporting Year' and 'Reporting Quarter'.

Reporting Year	Reporting Quarter
2009	April - Jun

The HCBC number, Name of Organisation, and Date Established are automatically displayed for the Organisation currently being captured.

Click the **"Add"** button


Click in each field to capture the Funding Information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Funder**
- **Initial Funding Month**
- **Last Funding Month**
- **Amount Funded**
- **Status**

Click the **"Save"** button

 **Note:** Funding can be discontinued

social development
Department:
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REPUBLIC OF SOUTH AFRICA

Home Community Based

TODAY'S DATE : 05/12/2009

REGISTRATION
>> HCBC Organisation
>> Personnel
>> Reassign

ORGANISATION REPORTS
PRINT BLANK FORMS

MANAGEMENT
>> Funding Information
>> MBE Meetings
>> Supervisory Visits
>> Problem Tracking
>> Sign-off Report

GENERATE REPORTS
DOWNLOAD DATA / EXPORTS
MAINTENANCE
HELP
MAIN MENU

Search Organisation
HCBC Number Search Clear

HCBC Organisation Details
HCBC Number: 148
Name of Organisation: Prime Time
Date Established: 10/05/2006

Funding History for Organisation : Prime Time

Initial Funding Month	Last Funding Month	Months	Funder	Amount	Discontinued on	Status
Select 01/02/2009	31/01/2010	12	Department of Social Development	R1,950.00		Committed

Funding Information
Funder* Department of Social Development
Initial Funding Month* 01/02/2009
Last Funding Month* 31/01/2010
Amount Funded* R1,950
Status* Committed

Discontinue Funding
Add Edit Cancel **Save**

All Funding Report details are saved to the database. The system displays a list of all reports received and captured.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Funding Report details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made to an Organisation's details need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

Learning unit 2: M&E Meeting

Outcomes

- ✓ Record Meeting
- ✓ Record Problem
- ✓ Record Meeting Attendance

1. M&E Meetings

1.1. Record Meeting

To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called **"M&E Meeting"**.

The screenshot shows the HCBC system interface. On the left, a sidebar menu lists various functions: Registration, Organisation Reports, Print Blank Forms, Funding Information (circled in red), Sign-off Report, Generate Reports, Download Data / Export, System maintenance, and Logout. The main content area is titled 'Home Community Based Care' and 'M&E Meetings'. It includes a search bar for 'Meeting Type' and a 'Please Select Below' dropdown. Below this, there are input fields for 'Date *', 'Location *', 'Purpose *', and 'Report Written By *'. A 'Number of Attendees *' field is also present. To the right of these fields, there are checkboxes for various attendees: DSD National Official attended, DSD Provincial Official attended, DSD District Official attended, DSD Local Official attended, DSD National Official attended, DSD Provincial Official attended, DSD District Official attended, DSD Local Official attended, Organisations attended, Attendees from organisations, Other attendees, and Total Number of Attendees. At the bottom, there are buttons for 'Add', 'Edit', 'Save', 'Cancel', and 'Record Problem'.

The M&E Meeting screen will load.

Click the **"Add"** button

Click in each field to capture the M&E Meeting information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Meeting Type (National, Provincial, District)**
- **Date**
- **Location**
- **Purpose**
- **Report Written By**
- **Number of Attendees**

Click the "Save" button

All M&E Meeting details are saved to the database.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click **"Save"** again.

If there are errors in the M&E Meeting details OR it is necessary to change them, the capturing official concerned should click on the **"Edit"** button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the **"Save"** button is not clicked, changes to any field will not be updated in the database. As per the **"Add"** procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in **"Edit" mode or "Add" mode, click the "Cancel" button.** All data will be cleared. The **"Cancel"** button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the **"Cancel"** button.

1.2. Record Problem

Once M&E Meeting details are saved you can continue to Record the problem by clicking on the **"Record Problem"** button. Ensure that you select the correct meeting before you continue to the problem page.

The screenshot shows the 'M&E Meetings' screen. On the left is a navigation menu with options like 'REGISTRATION', 'ORGANISATION REPORTS', 'PRINT BLANK FORMS', 'MANAGEMENT', 'GENERATE REPORTS', 'DOWNLOAD DATA / EXPORTS', 'SYSTEM MAINTENANCE', 'HELP', 'MAIN MENU', and 'LOGOUT'. The main content area has a header 'Home Community' and a sub-header 'M&E Meetings'. Below this is a search bar and a table of meeting details. A message states 'M&E Meeting details have been saved successfully'. Below the table is a form for recording a problem, with fields for Meeting Type, Province, District, Date, Location, Purpose, Report Written By, and Number of Attendees. The 'Record Problem' button is highlighted with a red circle.

Date	Location	Purpose	Report Written By	Number of Attendees
Select 17/12/2009	Port Elizabeth	Check Progress	99991004	63
Select 02/02/2010	office X	rev yy	yy	1
Select 01/02/2010	DSD office	review xix	Yaruyo	12
Select 01/02/2010	KwaZulu Natal	Progress	Sabukwe	30
Select 05/01/2010	Social Development	Discuss Problem	Htsiki	85

Meeting Type *
Province
District
Date *
Location *
Purpose *
Report Written By *
Number of Attendees *

DSD National Official attended 3
DSD Provincial Official attended 7
DSD District Official attended 10
DSD Local Official attended 3
DOH National Official attended 2
DOH Provincial Official attended 9
DOH District Official attended 14
DOH Local Official attended 5
Organisations attended 6
Attendees from organisations 16
Other attendees 4
Total Number of Attendees 85

Add Edit Save **Record Problem**

The Record Problem screen will load.

Click the **"Add Problem"** button.

The form is titled 'Record Problem' and includes the following fields:

- Report Date *
- Problem Ref Number
- Reporter(Persal Number)
- Problem affected area (Please Select Below)
- Province (Please select below)
- District (Please select below)
- HCBC Number
- Problem Identified at (Please Select Below)
- Problem Status (Identified)
- Date Problem Identified *
- Date Problem Solved *
- Number of days passed before resolution
- Problem Referred to
- Problem(One sentence)
- Problem Type (Please Select Below)
- Suggested Resolution
- Actual Resolution
- Problem Description

At the bottom, there are buttons: 'Add problem' (circled in red), 'Update problem', 'Save', and 'Cancel'.

Click in each field to capture the Problem information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Report Date**
- **Problem Reference No** (Will be auto generated by the system once the record is saved)
- **Reporter (Persal Number)**
- **Problem Affected Area** (National, Provincial, District)
- **Report Written By**
- **Problem Identified at**
- **Problem Status**
- **Date Problem Identified**
- **Date Problem Solved** (If problem is not yet resolved, this date is not mandatory)
- **Number of days passed before resolution**
- **Problem Referred to**
- **Problem(One sentence)**
- **Problem Type**
- **Suggested Resolution**
- **Actual Resolution**
- **Problem Description**

Click the "Save" button

The screenshot shows a web-based form titled "Record Problem". At the top, there are tabs for "Add", "Edit", "Update", "Cancel", and "Record Problem". The form contains the following fields and values:

- Report Date *: 04/11/2009
- Problem Ref Number: (empty)
- Reporter(Personal Number): 99991004
- Problem affected area: National
- Problem Identified at: M & E meetings
- Problem Status: Identified
- Date Problem Identified *: 04/11/2009
- Date Problem Solved *: (empty)
- Number of days passed before resolution: (empty)
- Problem Referred to: Namhla
- Problem(One sentence): Lack of Transport
- Problem Type: Resource
- Suggested Resolution: (empty text area)
- Actual Resolution: (empty text area)
- Problem Description: (empty text area)

At the bottom of the form, there are four buttons: "Add problem", "Update problem", "Save", and "Cancel". The "Save" button is circled in red.

All Problem details are saved to the database; a Problem reference no is allocated for the problem.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Problem details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Update Problem" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

Once M&E Meeting details are saved you can continue to Record the problem by clicking on the "Record Problem" button. Ensure that you select the correct meeting before you continue to the problem page.

1.3. Record Meeting Attendance

Once M&E Meeting details are saved you can continue to Record meeting attendance by clicking on the **"Attendees"** adjacent to **"M&E Meeting"**.

The screenshot shows the 'M&E Meetings' interface with the 'Attendees' tab selected. A red circle highlights the 'Attendees' link. The interface includes a sidebar with navigation options, a main content area with a table of meetings, and a form for adding attendees.

M&E Meetings

Search Reports Meeting Type* Please Select Below

M&E Meeting details have been saved successfully

Date	Location	Purpose	Report Written By	Number of Attendees
Select 17/12/2009	Port Elizabeth	Check Progress	99991004	63
Select 02/02/2010	office X	rev yy	yy	1
Select 01/02/2010	DSD office	review xx	Yasuyo	12
Select 01/02/2010	KwaZulu Natal	Progress	Sobukwe	30
Select 05/01/2010	Social Development	Discuss Problem	Htsiki	85

Meeting Type* District

Province Free State

District Thabo Mafutsanyane

Date * 05/01/2010

Location * Social Development

Purpose * Discuss Problem

Report Written By * Htsiki

Number of Attendees *

DSD National Official attended	3	DOH National Official attended	2
DSD Provincial Official attended	9	DOH Provincial Official attended	9
DSD District Official attended	12	DOH District Official attended	14
DSD Local Official attended	5	DOH Local Official attended	5
		Organisations attended	6
		Attendees from organisations	16
		Other attendees	4
		Total Number of Attendees	85

Add Edit Save Cancel Record Problem

The Attendees screen will load.

Search for the meeting type.

The screenshot shows the 'Attendees' screen with the 'M&E Meetings' tab selected. The search interface is visible, including a dropdown menu for 'Meeting Type' and search buttons.

Attendees

| M&E Meetings | Attendees |

Search Reports Meeting Type* Please Select Below

Search Clear

Select the meeting you want to add attendees for.

social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

TODAYS DATE : 21/03/2010

Registration
Organisation Reports
Print Blank Forms
Management
Generate Reports
Download Data / Export
System maintenance
Logout

Attendees

M&E Meetings | Attendees

Search Reports Meeting Type* Please Select Below

Search Clear

Meeting Details

Select	Date	Location	Purpose	Type of Meeting
Select	02/03/2009	Port Elizabeth	Assessment	National
Select	01/03/2010	East London	Assessment	National
Select	01/03/2010	East London	Assessment	National
Select	03/03/2009	Port Elizabeth	Assessment	National
Select	11/12/2009	Pretoria	Updates	National

1

Attendees

Name*

Position*

Add Edit Save

Click the **"Add"** button.

Download Data / Export
System maintenance
Logout

Meeting Details

Select	Date	Location	Purpose	Type of Meeting
Select	02/03/2009	Port Elizabeth	Assessment	National
Select	01/03/2010	East London	Assessment	National
Select	01/03/2010	East London	Assessment	National
Select	03/03/2009	Port Elizabeth	Assessment	National
Select	11/12/2009	Pretoria	Updates	National

1

Attendees for National Meeting in Pretoria

Select	Name	Position
Select	Ntsiki Ntwana	Secretary

1

Name* Ntsiki Ntwana

Position* Secretary

Add Edit Save

Click in each field to capture the Attendance information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Name**
- **Position**

Click the **"Save"** button

social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

TODAYS DATE : 21/03/2010

Registration
Organisation Reports
Print Blank Forms
Management
Generate Reports
Download Data / Export
System maintenance
Logout

Attendees

M&E Meetings [Attendees]

Search Reports Meeting Type* Please Select Below

Search Clear

Meeting Details

Date	Location	Purpose	Type of Meeting
Select 02/03/2009	Port Elizabeth	Assessment	National
Select 01/03/2010	East London	Assessment	National
Select 01/03/2010	East London	Assessment	National
Select 03/03/2009	Port Elizabeth	Assessment	National
Select 11/12/2009	Pretoria	Updates	National

1 2

Attendees for National Meeting in Pretoria

Name* Mziki Ntswana

Position* Secretary

Add Edit Save

All Attendees details are saved to the database. The system will list all Attendees added.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Attendees details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

Learning unit 3: Supervisory Visit

Outcomes

- ✓ Record Visit
- ✓ Record Problem

1. Supervisory Visit

To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called **"Supervisory Visit"**.

The screenshot shows the HCBC system interface. On the left, a sidebar menu lists various functions: Registration, Organisation Reports, Print Blank Forms, Management, M&E Meeting, Supervisory Visits (highlighted with a red circle), Sign-off Report, Generate Reports, Download Data / Export, System maintenance, and Logout. The main content area is titled 'Home Community Based Care' and 'M&E Meetings'. It includes a search bar for 'Meeting Type' and a 'Search' button. Below this, there are input fields for 'Date', 'Location', 'Purpose', and 'Report Written By'. A 'Number of Attendees' field is also present. To the right of these fields, there are checkboxes for various officials attending: DSD National Official, DSD Provincial Official, DSD District Official, DSD Local Official, DOH National Official, DOH Provincial Official, DOH District Official, and DOH Local Official. There are also checkboxes for 'Organisations attended', 'Attendees from organisations', and 'Other attendees'. A 'Total Number of Attendees' field is at the bottom right. At the bottom of the form, there are buttons for 'Add', 'Edit', 'Save', 'Cancel', and 'Record Problem'.

The Supervisory Visit screen will load.

Click the **"Add"** button

Click in each field to capture the Visit information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Date of visit**
- **Reporter (Persal Number)**
- **Reporter Name:** Populated from Persal Number
- **Officials Visited**
- **Accompanied By**
- **Visited Organisation:** Once all organisations visited are listed,
 - Click on "**Visit Summary**", a box to capture finding for the organisation is displayed.
 - Click on "**Problem Tracking**", the system will open the problem tracking page to capture problems identified in the visit.
- **Overall Visit Summary**

Supervisory Visits

Search Reports

Written by and

Date of visit between and

Province

District

Reports

Date of visit*

Reporter Peral Number*

Reporter Name*

Officials Visited ☐ National ☒ Province ☐ District ☐ Subdistrict/Service point

Accompanied By*

Accompanied By:

Visited Organisation:

HCBC Number

HCBC/NPO Number	Name of Organisation	Select
81	Angola	<input checked="" type="checkbox"/>

HCBC/NPO Number	Name of Organisation	Visit Summary	Problem Tracking
81	Angola		

Overall Visit Summary*

2. Problem Tracking

To record the Problem, Click on **"Problem Tracking"**.

Click the **"Add Problem"** button.

Report Date *

Problem Ref Number

Reporter(Persal Number)

Problem affected area

Province

District

HCBC Number

Problem Identified at

Problem Status

Date Problem Identified *

Date Problem Solved *

Number of days passed before resolution

Problem Referred to

Problem(One sentence)

Problem Type

Suggested Resolution

Actual Resolution

Problem Description

Click in each field to capture the Problem information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Report Date**
- **Problem Reference No** (Will be auto generated by the system once the record is saved)
- **Reporter (Persal Number)**
- **Problem Affected Area** (National, Provincial, District)
- **Report Written By**
- **Problem Identified at**
- **Problem Status**
- **Date Problem Identified**
- **Date Problem Solved** (If problem is not yet resolved, this date is not mandatory)
- **Number of days passed before resolution**
- **Problem Referred to**
- **Problem(One sentence)**
- **Problem Type**
- **Suggested Resolution**
- **Actual Resolution**
- **Problem Description**

Click the "Save" button

The screenshot shows a web-based form titled "Record Problem". At the top, there are tabs for "Add", "Edit", "Save", "Cancel", and "Record Problem". The form fields are as follows:

- Report Date *: 04/11/2009
- Problem Ref Number: (empty)
- Reporter(Persal Number): 99991004 Ntswana Ntsiki
- Problem affected area: National (dropdown)
- Problem Identified at: M & E meetings (dropdown)
- Problem Status: Identified (dropdown)
- Date Problem Identified *: 04/11/2009
- Date Problem Solved *: (empty)
- Number of days passed before resolution: (empty)
- Problem Referred to: Namibia
- Problem(One sentence): Lack of Transport
- Problem Type: Resource (dropdown)
- Suggested Resolution: (empty text area)
- Actual Resolution: (empty text area)
- Problem Description: (empty text area)

At the bottom of the form, there are four buttons: "Add problem", "Update problem", "Save", and "Cancel". The "Save" button is circled in red.

All Problem details are saved to the database; a Problem reference no is allocated for the problem. The system will take you back to the Supervisory Visit Page.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Supervisory Visit details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

Click the "Save" button.

The screenshot displays the 'Supervisory Visits' form. At the bottom of the form, there is a row of five buttons: 'Add', 'Edit', 'Save', 'Print', and 'Cancel'. The 'Save' button is circled in red. The form contains several sections: 'Search Reports' with fields for 'Written by', 'Date of visit between', 'Province', and 'District'; 'Reports' with fields for 'Date of visit*', 'Reporter Peral Number*', 'Reporter Name*', 'Officials Visited' (with checkboxes for National, Province, District, and Subdistrict/Service point), and 'Accompanied By*'; 'Visited Organisation:' with a table listing 'HCBC/NPO Number' and 'Name of Organisation'; and an 'Overall Visit Summary*' section at the bottom.

All Supervisory Visit details are saved to the database.

Learning unit 4: Problem Tracking

Outcomes

- ✓ Track and update Problem

1. Problem Tracking

To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called **"Problem Tracking"**.

The screenshot shows the HCBC system interface. The left sidebar menu includes options like Registration, Organisation Reports, Print Blank Forms, Management, Handling Information, M&E Meeting, Supervisory Visits, Problem Tracking (highlighted with a red circle), Generate Reports, Download Data / Export, System maintenance, and Logout. The main content area displays the 'M&E Meetings' section with a search bar and a list of attendance checkboxes for various officials and organizations.

The Problem Tracking screen will load with Information captured on M&E Meeting page or Supervisory Visit Page will be displayed.

Search by reference no. This was generated on the M&E Meeting page or Supervisory Visit Page.

Click the **"Edit"** button.

Problem Tracking

Search Reports Problem Ref Number

Reporter

Report Date between and

Organisation does not exist

Report Date	P. Ref. No.	Reporter	HCBC No	Prob. Status	Problem
Select 08/12/2009	1	99991004	0	Referred	Lack of transportation

1

Report Date

Problem Ref Number

Reporter(Persal Number) Htwana Htsiki

Problem affected area

Problem Identified at

Problem Status

Date Problem Identified

Date Problem Solved

Number of days passed before resolution

Problem Referred to

Problem(One sentence)

Problem Type

Suggested Resolution

Actual Resolution

Problem Description

Click in each field to capture the Problem information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Report Date:** This field can not be amended
- **Problem Reference No:** This field can not be amended
- **Reporter (Persal Number) :** This field can not be amended
- **Problem Affected Area:** you can amend this field if there are changes to be made (National, Provincial, District)
- **Report Written By:** This field can not be amended
- **Problem Identified at:** This field can not be amended
- **Problem Status** you can amend this field if there are changes to be made
- **Date Problem Identified:** This field can not be amended
- **Date Problem Solved** (If problem is not yet resolved, this date is not mandatory)
- **Number of days passed before resolution:** this field is calculated by the system once "**Date Problem Solved**" is captured.
- **Problem Referred to** you can amend this field if there are changes to be made
- **Problem(One sentence) :** This field can not be amended
- **Problem Type:** This field can not be amended
- **Suggested Resolution** you can amend this field if there are changes to be made
- **Actual Resolution** you can amend this field if there are changes to be made
- **Problem Description:** This field can not be amended

Click the **"Save"** button

The screenshot shows the 'Record Problem' form with the following fields and values:

- Report Date *: 04/11/2009
- Problem Ref Number: (empty)
- Reporter(Persal Number): 99991004
- Problem affected area: National
- Problem Identified at: M & E meetings
- Problem Status: Identified
- Date Problem Identified *: 04/11/2009
- Date Problem Solved *: (empty)
- Number of days passed before resolution: (empty)
- Problem Referred to: Namhla
- Problem(One sentence): Lack of Transport
- Problem Type: Resource
- Suggested Resolution: (empty text area)
- Actual Resolution: (empty text area)
- Problem Description: (empty text area)

At the bottom of the form, there are four buttons: 'Add problem', 'Update problem', 'Save', and 'Cancel'. The 'Save' button is circled in red.

All Problem details are saved to the database; a Problem reference no is allocated for the problem.

Note: If there is one or more required field not completed, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click "Save" again.

If there are errors in the Problem details OR it is necessary to change them, the capturing official concerned should click on the "Edit" button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the "Save" button is not clicked, changes to any field will not be updated in the database. As per the "Add" procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.


If the Capturer enters incorrect data whilst in "Update Problem" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The "Cancel" button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the "Cancel" button.

Learning unit 5: Sign-off Report

Outcomes

- ✓ Capture Report
- ✓ View report Status
- ✓ Print Sign-off Report

1. Sign-off Report

 **Note:** Only Co-ordinators from both Department of Health and Department of Social Development will capture Sign-off report details.


Department of Social Development Co-ordinator has access to capture only on the “**DSD specific section**” and “**General Section**”. They will not be able to capture on the “**DoH specific section**”, but will be able to view this section.

Department of Health Co-ordinator has access to capture only on the “**DoH specific section**” and “**General Section**”. They will not be able to capture on the “**DSD specific section**”, but will be able to view this section.

Values for outsourced / outcome indicators will only be entered if it an Annual Report being captured

Once both officials are in agreement that the information captured is correct and they have confirmed all sections on the system, the report will be submitted.

To proceed, the Capturing official should click on the text hyperlink, sub-menu of Management called “**Sign-off Report**”. Click on the report type you will capture.

 **Note:** The system will only allow the logged in person to capture only in their level, but will be able to view other levels. E.g. if report type selected is National only national official will have access to capture.

social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

TODAYS DATE : 21/03/2010

Registration
Organisation Reports
Print Blank Forms
Management
Funding Information
M&E Meeting
Supervisory Visits
Problem Solving
Sign-off Report
Generate Reports
Download Data / Export
System maintenance
Logout

Search Organisation
HCBC Number Search Clear

HCBC Organisation Details
HCBC Number 84
Name of Organization Lilitha HCBC
Date Established 01/06/2009

Organisation Report | Monthly Stipend | Monthly Service | Training | Procurement | Quarterly

NPO Monthly Procurement

	Year	Month	Date Received	Date Validated	Data valid	Data Capturer	Date Captured
Select	2010	February	25/01/2010	25/01/2010	Y	Nyami Xotyeni	21/03/2010
Select	2010	January	28/12/2009	29/12/2009	Y	Nyami Xotyeni	21/03/2010

The Sign-off report screen will load.

Click the **"Add"** button

social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

TODAYS DATE : 07/03/2010

Registration
Organisation Reports
Print Blank Forms
Management
Generate Reports
Download Data / Export
System maintenance
Logout

National Report

Search Reports
Province Eastern Cape
Search Clear

Add Edit Cancel Save Submit

Province* Eastern Cape
Reporting Year* 2009
Reporting Quarter* Jan - Mar
Reporter* Ntsiki Ntwana

Enter values for outsourced / outcome indicators
Values confirmed by DOH officials ☐ Yes ☒ No
Values confirmed by DSD officials ☐ Yes ☒ No
Please select below Add

Click on **"Edit"** in the your section.

Enter values for outsourced / outcome indicators

Values confirmed by DOH officials ☐ Yes ☒ No
Values confirmed by DSD officials ☐ Yes ☒ No
Please select below Add

General Section View Edit
Contents confirmed by DOH officials ☐ Yes ☒ No
Contents confirmed by DSD officials ☐ Yes ☒ No

DOH specific section View Edit
Section completed ☐ Yes ☒ No

DSD specific section View Edit
Section completed ☐ Yes ☒ No

Click in each field to capture the Sign-off information OR use the drop down lists to select the appropriate option.

An asterisk (*) to the right of a field's label denotes a required field. Details will not be saved to the database if these required fields have not been appropriately filled in.

Detailed field descriptions of the data required to be entered is a function of the policy of the Department of Social Development and Department of health, and may change from time to time.

- **Summary**
- **Challenges and solutions**
- **Plan for next term**
- **Contents confirmed by DSD officials:** Click "Yes" if in agreement with the content of the report. On the "General Section".
- **Section Completed:** Click "Yes" if in the section is completed. On the "DSD specific section".

Click the "Save" button.

Enter values for outsourced / outcome indicators

Values confirmed by DOH officials ☐ Yes ☒ No

Values confirmed by DSD officials ☐ Yes ☒ No

Please select below

General Section

Contents confirmed by DOH official ☐ Yes ☒ No

Contents confirmed by DSD officials ☐ Yes ☒ No

Summary

Summary

Challenges and solutions

Challenges and solutions

Plan for next term

Plan for next term

Section written by: Ntsiki Ntwana

DOH specific section

Section completed ☐ Yes ☒ No

DSD specific section

Section completed ☐ Yes ☒ No

Summary

Summary

Challenges and solutions


Challenges and solutions

Plan for next term

Plan for next term

Section written by: Ntsiki Ntwana


All Sign-off report details are saved to the database.

 **Note:** *If there is one or more required field not completed*, the system generates an information message stating which fields need to be filled in and the correct format to do so. The Capturer should go back to those required fields and complete them accordingly. Once this is done, the Capturer will click **"Save"** again.

If there are errors in the Sign-off report details OR it is necessary to change them, the capturing official concerned should click on the **"Edit"** button. All greyed out fields are now enabled, allowing the Capturer to make necessary changes. Note that the Capturer will only have access to those fields ordinarily available to that Capturer. Any changes that are made need to be saved. If the **"Save"** button is not clicked, changes to any field will not be updated in the database. As per the **"Add"** procedure, the normal procedure for adding and saving data applies after the edit button has been clicked.

If the Capturer enters incorrect data whilst in "Edit" mode or "Add" mode, click the "Cancel" button. All data will be cleared. The **"Cancel"** button should be used sparingly as all fields completed are deleted. The backspace and delete keys should be used in conjunction with highlighting the data with the cursor to delete or cancel data in a specific field, rather than using the **"Cancel"** button.

Once Sign-off report details are confirmed complete and are saved, a report can be submitted by clicking on the **"Submit"** button.

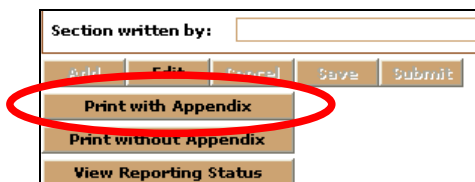
 **Note:** No changes can be done for the sign-off once it has been submitted.

1.1 Printing Sign-off report

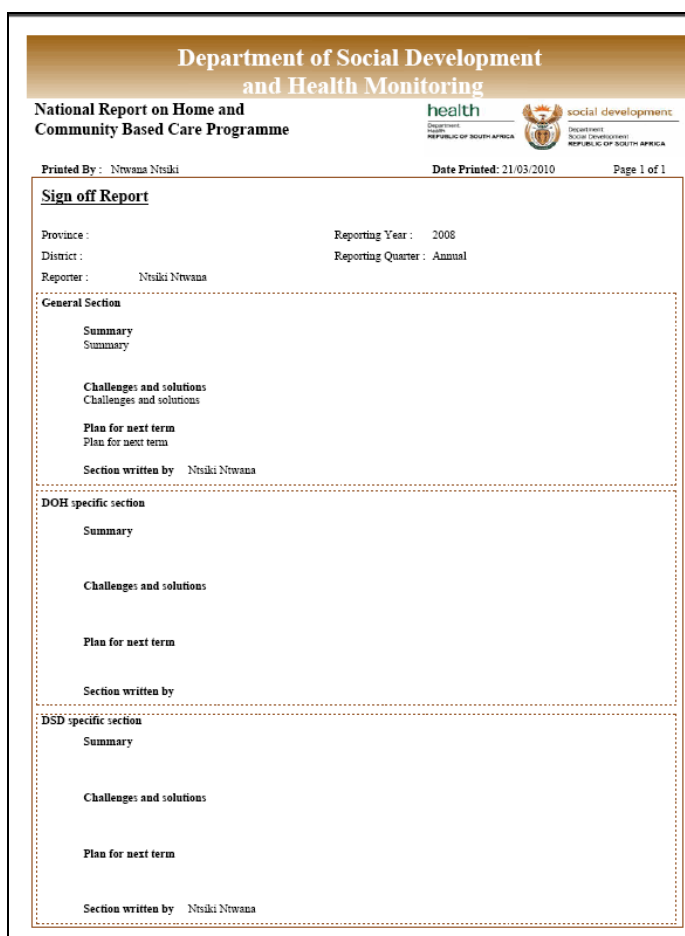
Once Sign-off report for that quarter or for that year has been saved, a report can be printed. There are two ways the sign-off report can be printed. (With Appendix and without Appendix)

1.1.1 Print with Appendix

Click on “**Print with Appendix**” button. A Sign-off report will be printed with Monthly Report; Quarterly Report, Registration report and (Outsourced Data - if Annual report)



Section written by:



**Department of Social Development
and Health Monitoring**

**National Report on Home and
Community Based Care Programme**

Printed By: Nwana Ntsiki Date Printed: 21/03/2010 Page 1 of 1

Sign off Report

Province : Reporting Year : 2008
District : Reporting Quarter : Annual
Reporter : Ntsiki Nwana

General Section

Summary
Summary

Challenges and solutions
Challenges and solutions

Plan for next term
Plan for next term

Section written by Ntsiki Nwana

DOH specific section

Summary

Challenges and solutions

Plan for next term

Section written by

DSD specific section

Summary

Challenges and solutions



Plan for next term

Section written by Ntsiki Nwana

1.1.2 Print without Appendix

Click on "Print without Appendix" button.

Section written by: <input type="text"/>				
Add	Edit	Cancel	Save	Submit
Print without Appendix				
Print without Appendix				
View Reporting Status				

Department of Social Development and Health Monitoring	
National Report on Home and Community Based Care Programme	 
Printed By : Ntwana Ntsiki	Date Printed: 21/03/2010 Page 1 of 1
Sign off Report	
Province :	Reporting Year : 2008
District :	Reporting Quarter : Annual
Reporter : Ntsiki Ntwana	
General Section Summary Summary Challenges and solutions Challenges and solutions Plan for next term Plan for next term Section written by Ntsiki Ntwana	
DOH specific section Summary Challenges and solutions Plan for next term Section written by	
DSD specific section Summary Challenges and solutions Plan for next term Section written by Ntsiki Ntwana	

1.2 View Reporting Status

Before the coordinators submit the report, they can view the status of reporting to be able to check the percentage of organisation report submissions.

Section written by:



and Health Monitoring			
National Report on Home and Community Based Care Programme		 Department: Health REPUBLIC OF SOUTH AFRICA	 Department: Social Development REPUBLIC OF SOUTH AFRICA
Printed By : Ntwana Ntsiki		Date Printed : 21/03/2010	Page 1 of 1
Report Submission Status for Annual Report in South Africa			
Summary :			
	Number of Organisations	Submitted Report	Rate(%)
a. DOH funded	10	1	0
b. DSD funded	7	1	0
c. not funded by DOH/DSD	10	0	
d. Total	27		
Show Detail :			
province	DOH Funded	DSD Funded	
Eastern Cape	5	5	
Free State	0	0	
Kwazulu-Natal	3	0	
Limpopo	0	1	
Northern Cape	2	1	

Table 2 - Emergency Instructions

Lost Password

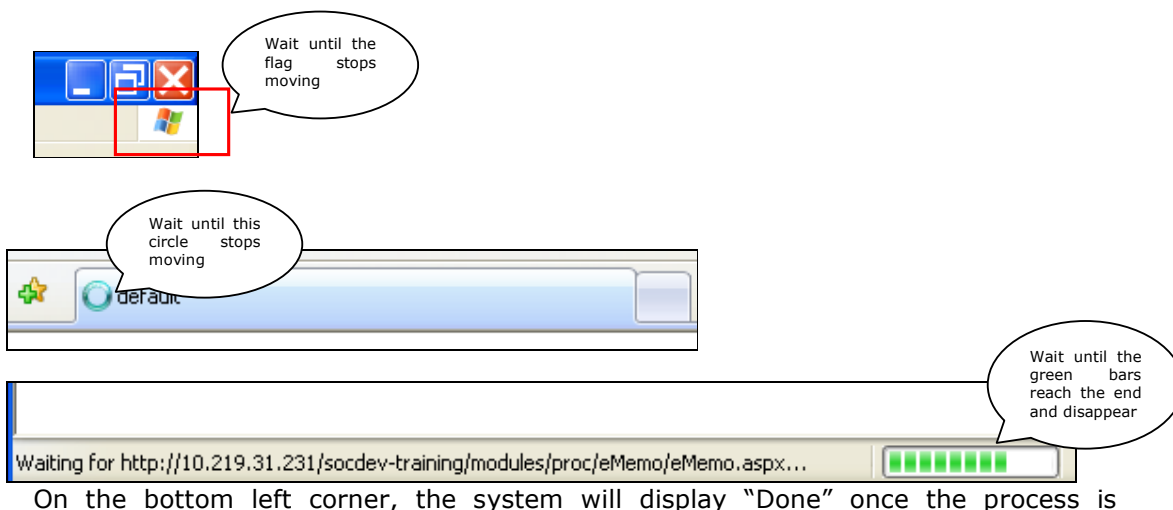
1. If a Capturer forgets his or her password, a call should be logged immediately so that the Capturer password can be re-set. All calls must be logged through SITA Helpdesk, for immediate attention with logged SDIMS related problems call SDIMS Support centre, quote the SITA Helpdesk reference no.
2. **Note:** on the top right hand side of the screen there's a SITA Helpdesk number to log calls. When a SDIMS related problem is logged, an official (with a reference no for the logged call ready) must call the SDIMS support centre at 043 700 8415 / 043 700 8434 / 043 700 8483 / 043 700 8445 for the call to be attended as soon as possible.
3. A Capturer shall under no circumstances "borrow" a Username and password combination from another Capturer, with or without his or her consent or knowledge.

Power Failure

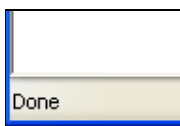
1. If a power failure occurs while a Capturer is in the process of entering information or making changes to records in the Management Information System, and he or her has not yet clicked the "Save" button, all information entered prior to the power failure will not have been written to the database.
2. All information must be re-captured once the system is online again.

Tips on Capturing

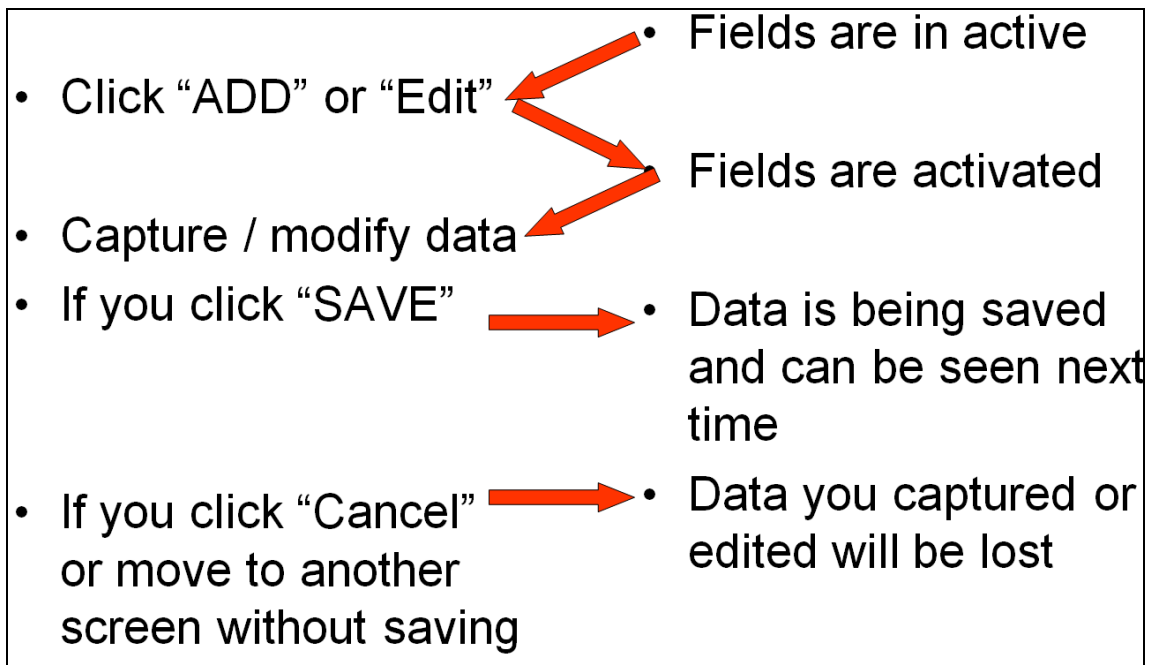
1. When the system is process, be patient. Look out for the following depending on the internet version you are using.



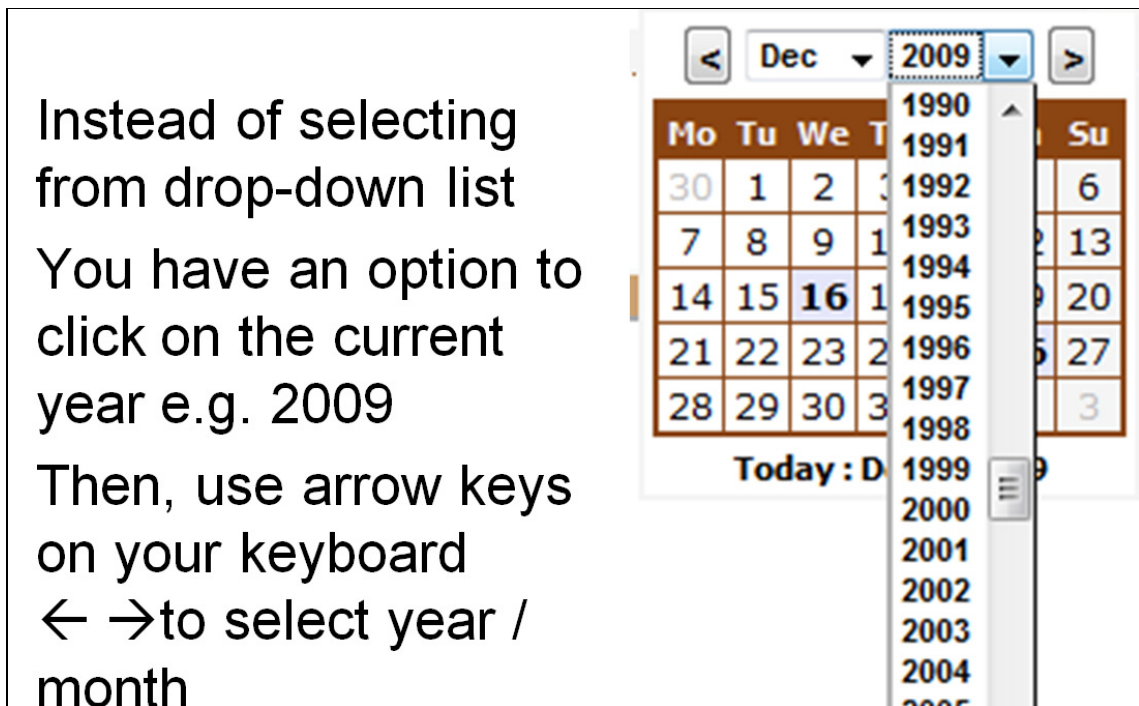
completed.



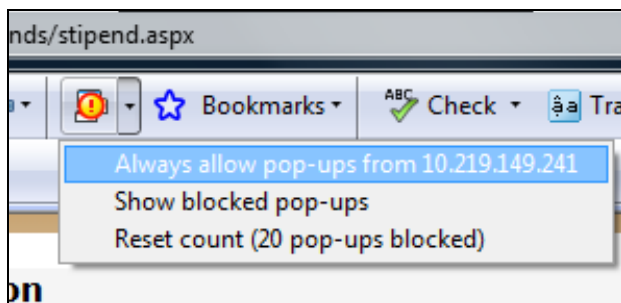
2. Indication on which button to use and when to use it.




3. Quick option on capturing date.



4. When printing, look out for Pop-up blocker. Click on "**Always allow pop-up**".

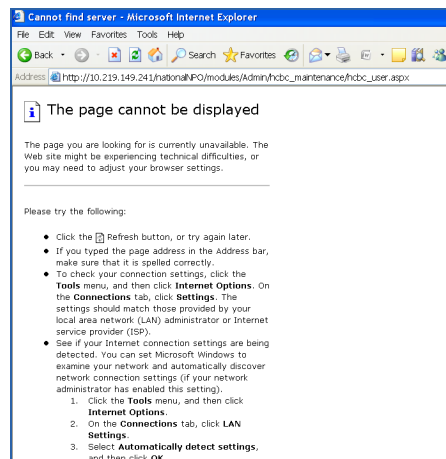
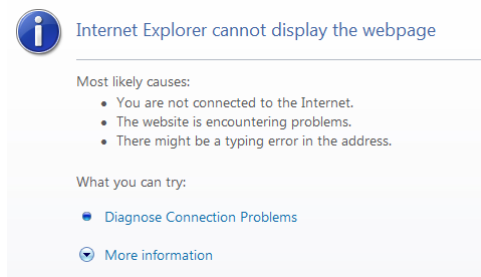


5. The session gets terminated if you don't capture anything on the system for 15 minutes. The system will display the following:

 social development Department: Social Development REPUBLIC OF SOUTH AFRICA		Home Community B	
TODAY'S DATE : 17/02/2010			
REGISTRATION >> HCBC Organisation >> Personnel >> Reassign		<h2 style="text-align: center;">Home Care Based Community Access Control</h2> <p>[User ID :]</p> <div style="border: 1px solid black; padding: 5px; text-align: center;"> Your Session Has Expired. Click on the link below to re-login. </div> <p style="text-align: center; font-style: italic;">When you leave the system idle for 45 seconds, your session is terminated automatically, for security reasons. You will then have to re-login to continue what you were doing.</p> <p style="text-align: center;">Go to the login page.</p>	
ORGANISATION REPORTS			
PRINT BLANK FORMS			
MANAGEMENT >> Funding Information >> M&E Meetings >> Supervisory Visits >> Problem Tracking >> Sign-off Report			
GENERATE REPORTS			
DOWNLOAD DATA / EXPORTS			
SYSTEM MAINTENANCE			
HELP			
MAIN MENU			
LOGOUT			

Use the back button then log out, and log in again.

6. Depending on the internet version you use, if the following is displayed the refresh the screen.



To refresh the screen press this button.



or

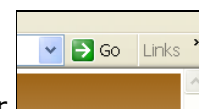


Table 3 - Reference List

Community Based KPA Document (2002)	'Community Based Services'. Community Based Key Performance Area (KPA) Document. Social Development. National Government.
CorpInfo Services (2002)	'Defense in depth. A Strategy for Securing Information in Today's Networked Environment.' [Online]. Available: www.corpinfo.com/Defense_in_Depth.doc [Accessed: 14 February 2003]
Document of Monitoring and Evaluation System (SDIMS) based on performance indicators Document (2002)	'Terms of Reference' Development of Monitoring and Evaluation System based on performance indicators Document. Social Development. National Government.
Process Impact	'Software Requirements Specification'. [Online]. Available: www.processimpact.com/process_assets/srs_template.doc [Accessed: 03 February 2003]
RUSecure (2002)	'Information Security: A Managed Response'. [Online] Available: http://www.rusecure.co.uk/information_page.htm [Accessed: 14 February 2003]

Table 4 - Glossary

Attributes	The basic unit of information about an entity occurrence.
Data Flow Diagram	DFDs show the logic and flow of data through an information system in a graphical and top-down manner.
Entity	Representations of people, places and things that encapsulate the business model including rules, data and relationships.
Entity Relationship Diagram	ERD's model entities (tables) and the relationships between them.
Key Performance Indicators	Key performance indicators that can easily be tracked by coordinators at all levels.
Management Information System	Organisation, storage and retrieval of data that is accumulated and created by use of computers and computer programs.
Software Requirements Specification	The SRS document details what is to be produced and the product to be generated from the definition.

Systems Development Life Cycle	<p>A process by which project managers, systems analysts, programmers, and end Capturers build information systems. It consists of five phases:</p> <ol style="list-style-type: none"> 1. Planning 2. Analysis: currently at this phase of development 3. Design 4. Implementation 5. Maintenance
Use Case Diagram	<p>Describe functions of a system from a Capturers standpoint. Consists of a scenario, which describes current work situations. The scenario, which represents the view of a Capturer, comprises the system that is being developed as a black box. The inner workings of the system are hidden to the Capturer. Only the external system behaviour viewed from a concrete working context of a Capturer is of interest. In this perspective the focus is on typical interactions between Capturers and the application system</p>